About this document

This shaping document aligned the team and informed detailed requirements. The product triad co-owned it, with the broader team contributing directly. This portfolio version is adapted from the original Confluence document; names, internal links, and recordings have been removed.

My Account - Order status and tracking

Created	Mar 10, 2021
Design	Adobe XD file (internal link removed)
Prototype	InVision prototype (internal link removed)
Whiteboard	Mural board (internal link removed)
Shaping Status	COMPLETE - In Development
Last Updated	Apr 30, 2021

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Team

List all shaping team members.

- Product Manager - *Beau Romero*
- Designer - *Product design lead*
- Engineering - *Engineering lead*
- Product Marketing - *Product marketing manager*
- Copy - *Copywriter*
- SMEs - *Four subject matter experts from the business*
- Sponsors - *VP of Product and two executive sponsors*

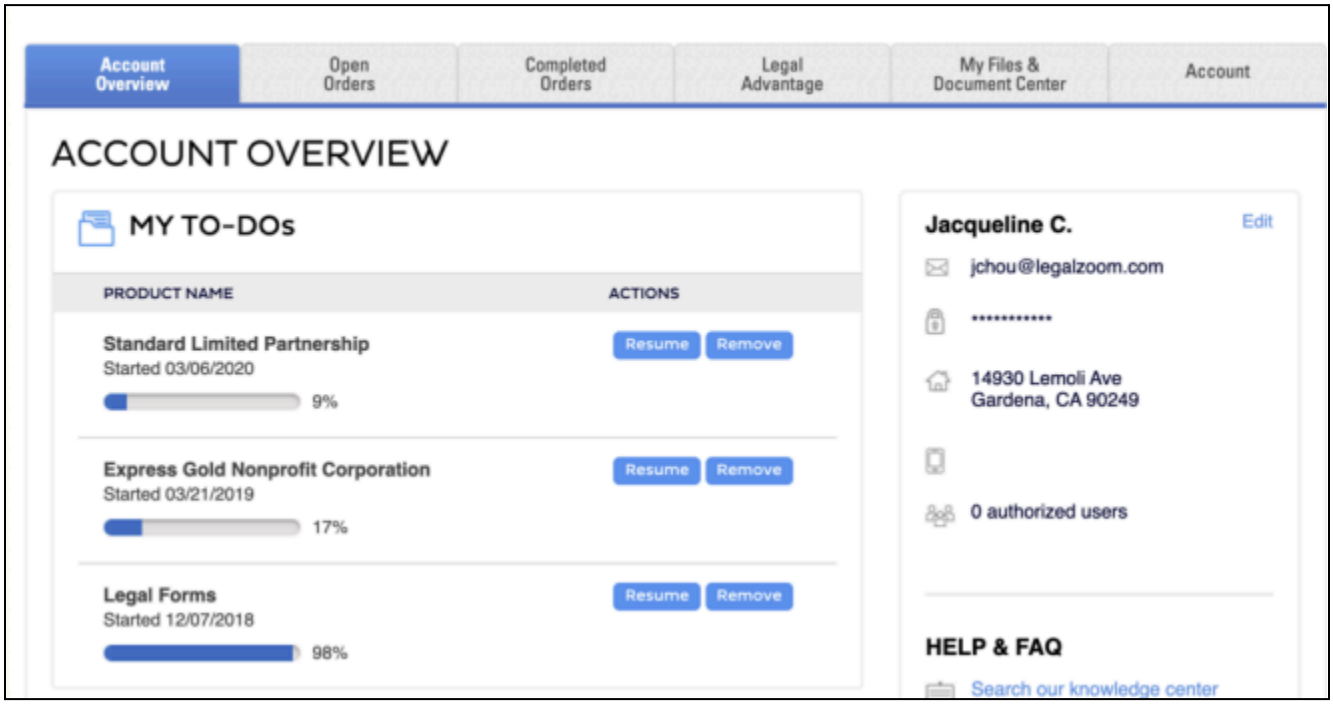
Problem

Description of the problem to align the shaping team on the problem at hand and provide anyone at LegalZoom with an understanding of why we are working on this initiative. Owner: PM

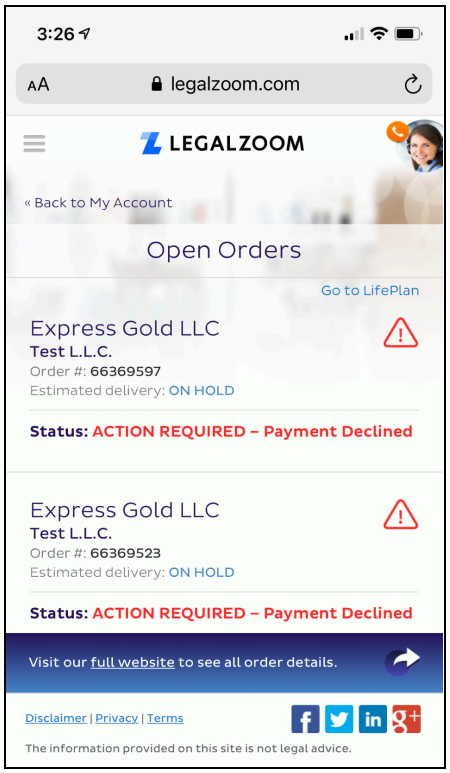
Refreshing the post-purchase experience ("My Account") is long overdue. The My Account experience we have today was designed to deliver LegalZoom's original transactional products. It has not evolved as LegalZoom started offering subscription products and has only seen marginal surface-level improvements.

All customers **currently suffer** through:

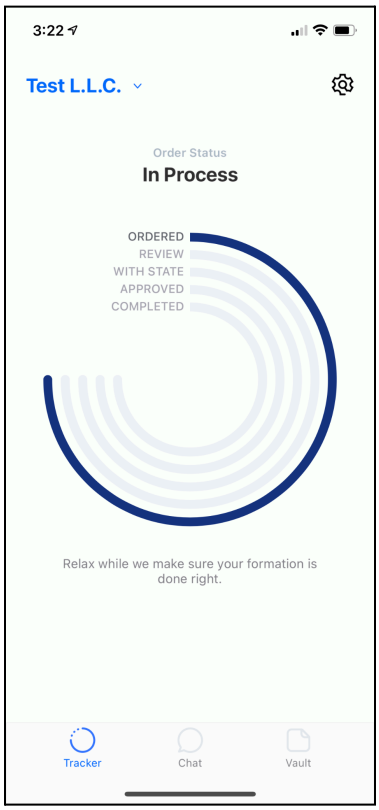
- **Completely different experiences** on desktop/tablet, mobile web, and the mobile app
- Very **limited functionality on mobile** devices:
  - iOS and Android apps offer: order tracking, an unmaintained chatbot, and a files browser
  - The mobile web view offers: a read-only view of open and completed orders, a link to schedule a consultation, and a link to view Registered Agent mail
- **Outdated, inconsistent terminology**, such as "Legal Advantage" to describe our legal plans
- A **jarring visual transition** from purchasing something through our redesigned website to their My Account, where they receive their products and services



Desktop web has decent order tracking, but fixing any issues requires calling customer care.



Mobile web is a read-only view of what's wrong, with no way for customers to take action.



The iPhone app has significantly different visuals and terminology for order tracking.

In order to deliver results quickly while rebuilding the My Account experience for all of our customers, we feel strongly that we must start by focusing on our largest customer base: **new LLC customers**.

New LLC customers cannot tell by looking at My Account:

- An accurate estimated date of when they will receive their filed formation documents
- An accurate, simple status of their order
- The steps involved with filing their formation through LegalZoom and the Secretary of State
- Where their documents will be delivered - our care agents often teach customers how to navigate

Additionally, when something goes wrong, LLC customers do not know:

- Which orders require an action
- Details behind their order status beyond generic messages
- What they need to fix or do to get their order back on track
- An updated estimated date of when they will receive their filed formation documents once an issue has been resolved

Solution

Description of the solution so anyone within the organization can easily understand the proposed solution from a coach and client's perspective. Note: The solution will be detailed in the user stories. Owner: PM

The new My Account and LLC order status and tracking experience will:

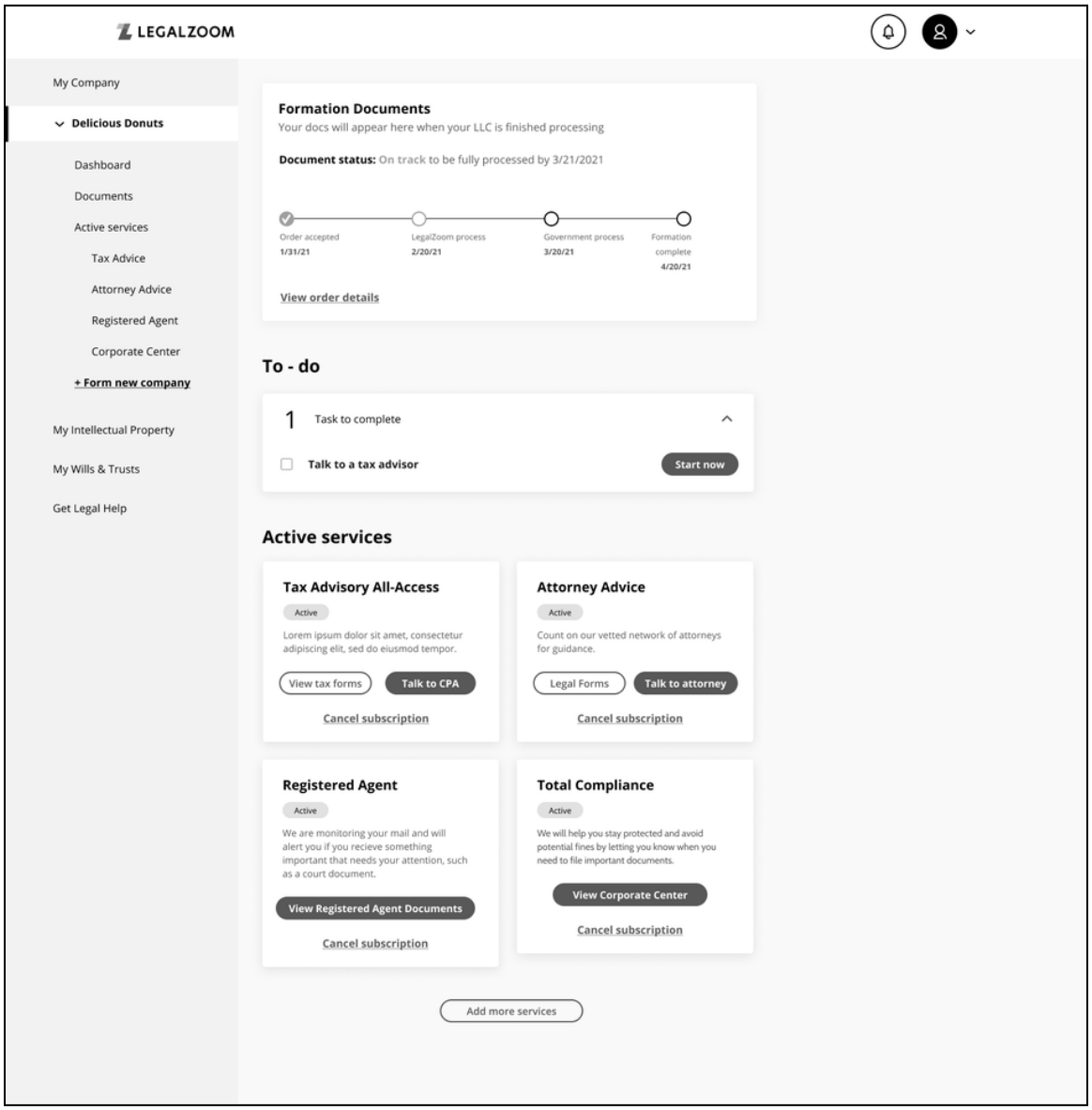
- Provide customers a modern, responsive experience viewable on all of their desktop/mobile/tablet devices
- Provide simple, accurate order status and tracking for business formation orders and add-on products and services
- Establish a foundation to deliver self-serve problem order resolution functionality which will ultimately increase speed to formation

This project is intended to lead us to completely retire the existing version of My Account.

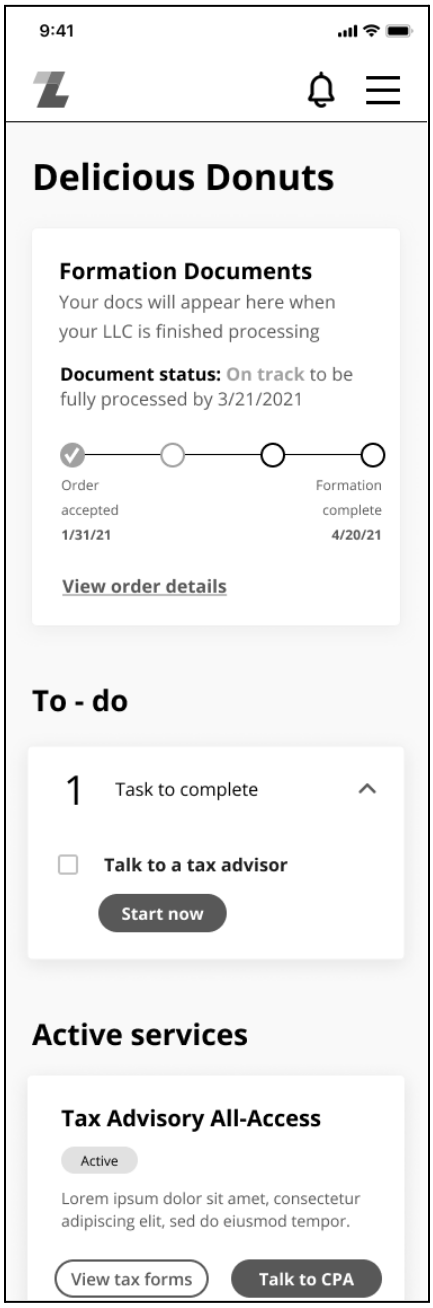
New LLC customers will be able to "live" in the new My Account from Day 1, and only be sent to the old experience for Account Management & Billing. To accomplish this, we are also including the following features:

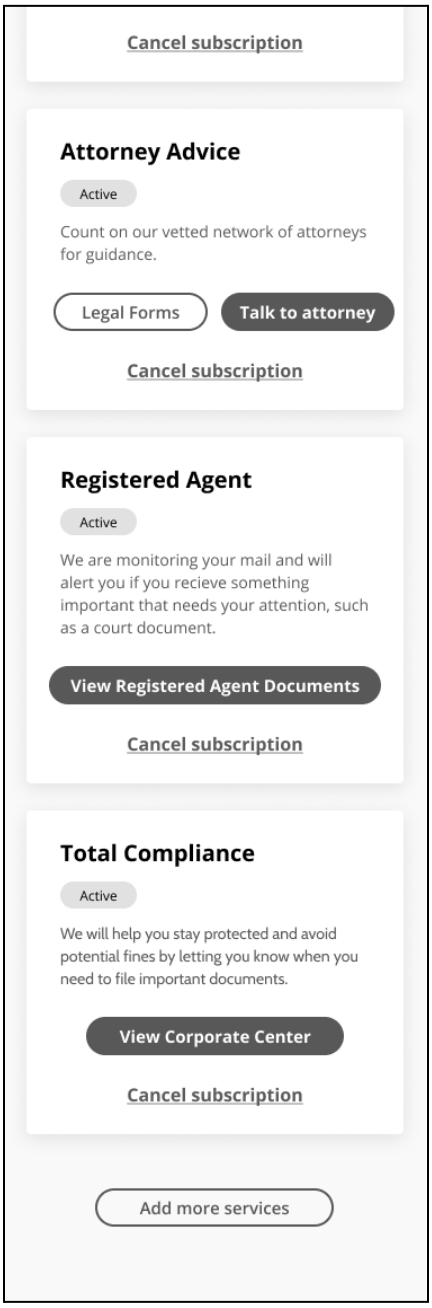
- Displaying their documents and files (same as current state)
- Providing an external link to Corporate Center (same as current state)
- Providing an external link to Registered Agent (same as current state)
- Providing an external link to Schedule an Attorney/Tax consultation (same as current state)
- Displaying any upcoming and historical tax and attorney consultations

Full wireframes of the home screen:



Mobile version



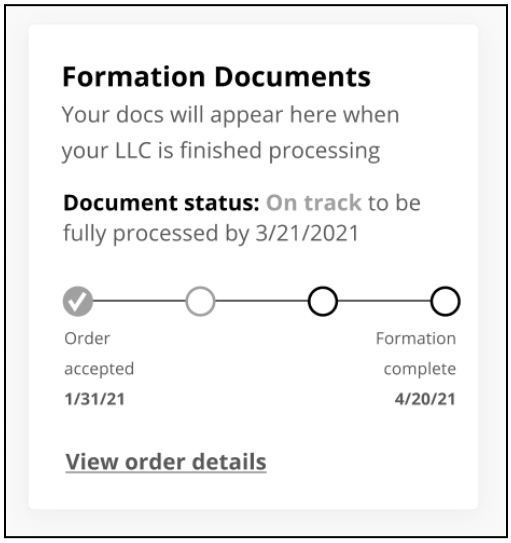


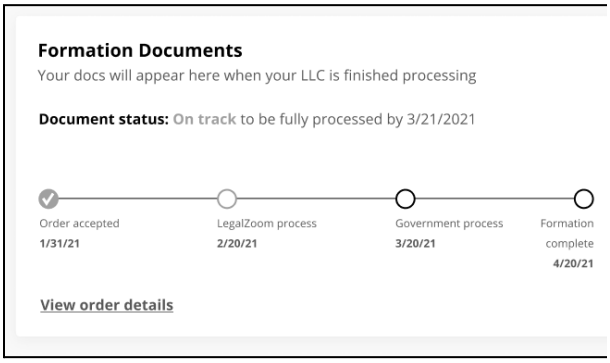
User Stories

A detailed explanation of the value we are trying to deliver. The more detail that is covered in the user stories and acceptance criteria, the less likely we are to encounter surprises during development. Designs should provide a high-level overview of the solution with more detail for the complex parts of the experience. Owner: PM for user stories + acceptance criteria; Design for wireframes and details on complex interactions.

MVP: If these stories are done, we can release V1 of this.

1. **As a customer that recently purchased an LLC, I can see my estimated date of completion so that I know when my business is officially formed.**
   - Acceptance Criteria
     - Estimated date is accurate based on the information we have internally
     - Estimated date is updated after a problem order issue has been resolved
     - Estimated date is removed during problem order with a message informing the customer that the order is delayed pending resolution
     - Status displayed has details that are specific to the customer's order, not generic
     - Customer must have LegalZoom account and be logged in
     - Experience is responsive to mobile phone, tablet, and desktop screen sizes
   - Notes
     - Estimated dates are shown only when the available order and state processing data supports a reliable estimate.
   - Wireframes



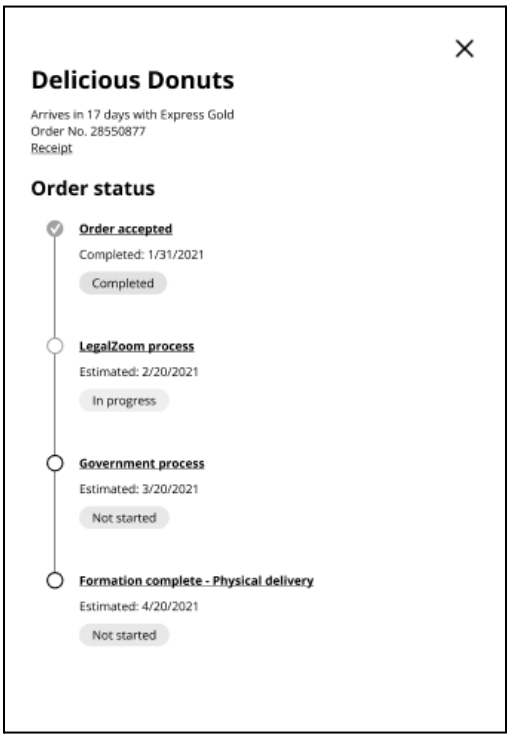


2. **As a customer that recently purchased an LLC, I can track the status of order so that I understand what has been done and what is left to get my business officially formed.**
   - Acceptance Criteria
     - See: Complete order status and state mapping (internal link removed)
     - A progress bar shows how far along an order is in relation to overall process
     - Details about the LegalZoom and Secretary of State steps involved are available
     - The process steps are displayed according to the mockups, using very simple language

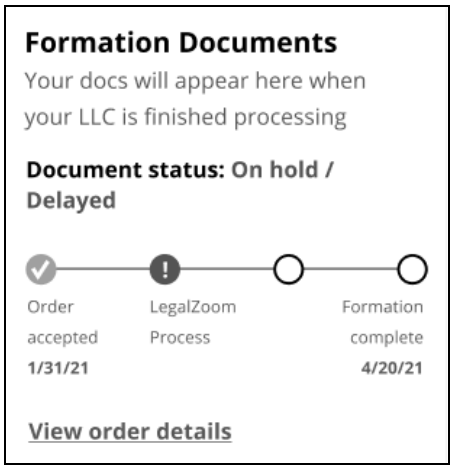
- Customer must have LegalZoom account and be logged in
- Experience is responsive to mobile phone, tablet, and desktop screen sizes

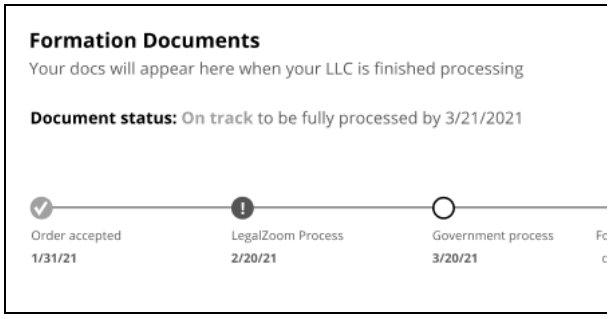
- Wireframes



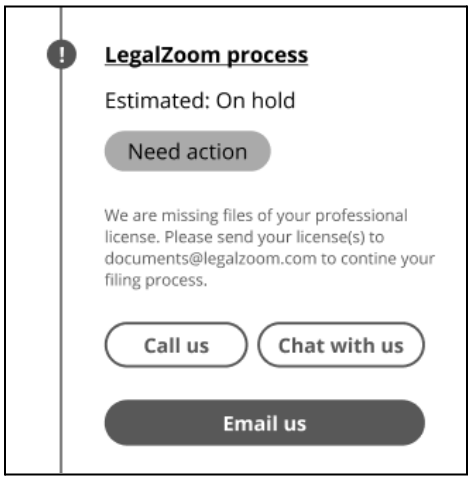


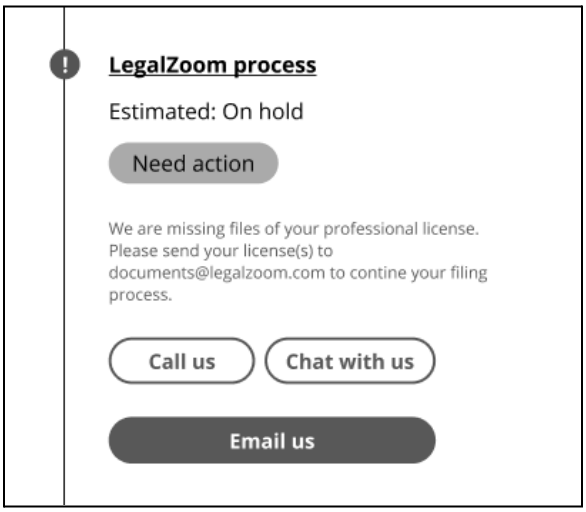
3. **As a customer that recently purchased an LLC and the order has a problem, I can see what is wrong with the order so that I know why my order is stalled and understand any potential delays.**
   - Acceptance Criteria
     - Estimated date is removed during problem order with a message informing the customer that the order is delayed pending resolution
     - Estimated date is updated after a problem order issue has been resolved
   - Wireframes





4. **As a customer that recently purchased an LLC and the order has a problem, I can see what steps I need to take, if any, to resolve the issue so that my business can be formed as quickly as possible.**
    - Acceptance Criteria
        - If the order is on hold because of something the customer needs to do, the customer can clearly see an action is needed from them
        - If an order is on hold because of something LegalZoom needs to do, the customer can clearly see what LegalZoom is doing on their behalf
        - For actions that need to be taken by the customer, status and instructions on how to resolve any issues are show with details that are specific to the customer's order, not generic
        - Customer must have LegalZoom account and be logged in
        - Experience is responsive to mobile phone, tablet, and desktop screen sizes
        - See: Complete order status and state mapping (internal link removed)
    - Wireframes

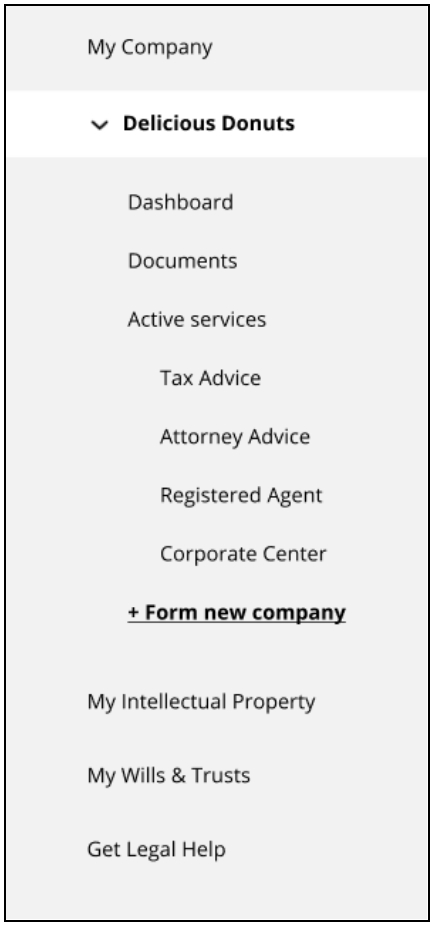




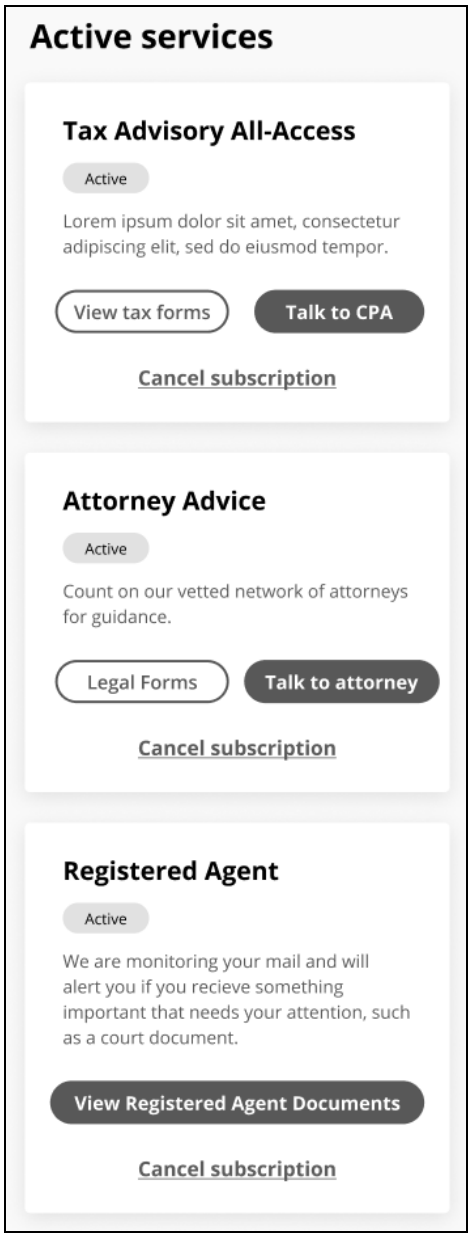
5. **As a customer that recently purchased an LLC, I can access my documents, consultations, and other LegalZoom services so that I can find everything associated with my business.**
    - Acceptance Criteria

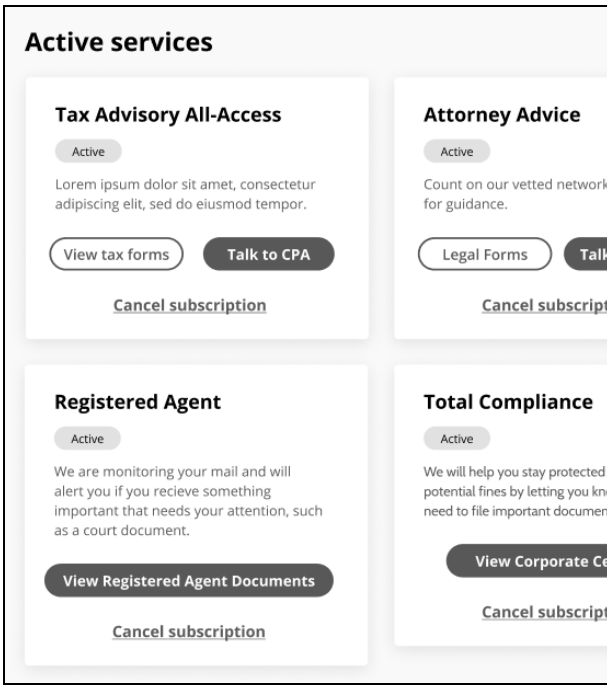
    - In menu and where services are displayed, provide link to Corporate Center that opens in new window: https://www.legalzoom.com/RACorporateCenter/CompanyDashboard.aspx
    - If customer has an active Registered Agent service, in menu and where services are displayed, provide link to Registered Agent that opens in a new window: https://www.legalzoom.com/dra/
    - If customer has an access to schedule tax consultations, in menu and where services are displayed, provide link to Schedule Tax Consultation that opens in a new window: https://www.legalzoom.com/consultation
    - If customer has access to schedule attorney consultations, in menu and where services are displayed, provide link to Schedule Attorney Consultation that opens in a new window: https://www.legalzoom.com/consultation
    - If a customer has had access to schedule attorney or tax consultations in the past, show a list of past attorney and tax consultations the customer scheduled and/or attended
    - If a customer has access to schedule attorney or tax consultations, show a list of upcoming attorney and tax consultations
    - Display a view of all the customers files and documents, as displayed inside of: https://www.legalzoom.com/LZWeb/MyAccount/DocumentCenter.aspx
    - Customer must have LegalZoom account and be logged in
    - Experience is responsive to mobile phone, tablet, and desktop screen sizes (not including the end points for external links)
- Wireframes





6. **As a customer that recently purchased an LLC, I can access account, billing, and service management so that I can manage the products associated with my business.**
    - Acceptance Criteria
        - Provide a single external link to update payment information and/or cancel any services: https://www.legalzoom.com/LZWeb/MyAccount/PaymentManage.aspx
        - Show customer a list of all active services associated with the LLC: Registered Agent Service, Total Compliance, Business Advisory Plan: Legal Protect, Smart Employer, Business License Package, EIN Obtainment
        - Customer must have LegalZoom account and be logged in
        - Experience is responsive to mobile phone, tablet, and desktop screen sizes
    - Wireframes





7. **As LegalZoom, I want to control which LegalZoom customers see the new My Account experience so that we can keep the scope of the initial release manageable.**
    - **Acceptance Criteria**
        - New experience is only shown to customers that have purchased one business product from LegalZoom - an LLC product
        - Traffic can be controlled by % and state so that we can test for any unexpected production issues, given the fragile lower environment backend systems
        - Customers have a way to "escape" the new experience and use the old My Account

Design Sprint Exploration

Currently, there is no reliable way to understand post-purchase customer behavior using quantitative data alone. As such, we ran a design sprint 3/1/21 to 3/5/21 to get additional customer feedback on how we might solve the many problems our current state My Account experience is creating today.

Recordings

Five recorded customer sessions. Recording links and passcodes removed; participant first names replaced.

1. Participant 1 (first-time business owner)
2. Participant 2 (first-time business owner)
3. Participant 3 (multiple businesses, existing LZ customer)
4. Participant 4 (multiple businesses)
5. Participant 5 (first-time business owner)

Coming out of the design sprint, we have declared several Design Principles based on customer feedback:

1. LegalZoom is in the driver seat, guiding customers on what they need to do and when
2. Speed to resolution is key, and experience should be action-oriented and intuitive
3. Core functionality is product-agnostic, scalable to all LZ products for a consistent experience
4. Prioritize quick implementation over aspirational features, due to current state pain points
5. Reinforce value, providing a clear understanding on what the customer has purchased

Technical Approach

Description of the technical approach, if the solution requires the introduction of new technology or a material-technical challenge. Owner: Development

The new My Account will be a responsive web experience released behind a feature flag. Rollout can be controlled by customer cohort, state, and percentage, with access to the legacy experience retained during migration.

A new API layer will translate data from existing order, product, document, and consultation systems into a consistent customer-facing model.

Existing authentication and service management experiences will be reused where practical. Instrumentation will track adoption, order status engagement, errors, and support channel use.

Estimate

Estimated # of sprints to deploy the work (6 weeks max). Owner: Tech lead

Recommended: 6 weeks / 3 two-week sprints

- Sprint 1: Responsive application foundation, navigation, order status UI, and customer-facing status model
- Sprint 2: Order API integration, estimated completion dates, formation steps, and problem order states
- Sprint 3: End-to-end testing, analytics, accessibility, refinement, and controlled-rollout preparation

Notes:

- Front-end and API work will happen in parallel where possible. Limited to order status and tracking, using existing APIs.
- Customers would continue switching to the legacy My Account for documents, services, consultations, and account management.

Owner: Engineering

No-Gos

List of the things that the team considered and intentionally decided to exclude from the scope of this initiative. The intent behind documenting these is to help the team understand the breadth of what was considered. Owner: PM

Planned for next phases

Self-resolution

- Ability for a customer to fix issues on their own through My Account is dependent upon us building the new order status and tracking experience.
- There's enough customer and business benefit to release order status and tracking alone without waiting on this feature. For the initial release, we will provide customers with instructions on how to resolve an issue with options to email, chat, or call customer care.

Revised presentation of documents

- We know documents are the primary driver for purchasing the majority of our products today, and customers have trouble finding them in the experience today. The way we present documents to customers today is confusing and customers often have to reach out to customer care for assistance.
- Unfortunately, the current documents system was built as a proof-of-concept and requires a high tech effort to revamp the UI so we will hold off on this.

Account and billing management

- One of the top drivers for My Account usage today is customers attempting to fix account and billing issues, but we do not provide an intuitive way to resolve these issues.
- The current order receipts are very confusing for customers, but too high of a tech effort to bring into an initial release.
- There's enough customer and business benefit to release order status and tracking alone without waiting on this feature.

Potential future enhancements

Native iOS and Android apps

- As we no longer encourage users to download our mobile apps, this is out of scope until the overall native mobile app and app store channel strategies for LegalZoom are determined.

Daily insights

- Displaying personalized articles from our article center based on information we know about the customer and where they are in their business journey.
- Customers were receptive to this idea, as they are naturally curious individuals who do lots of research outside of LegalZoom already.

Better login and authentication

- Customers have trouble remembering their login, and our password reset experience is not ideal.
- There is a larger tech effort to revamp user authorization.

Interactive service tiles

- To provide ongoing value, we believe customers need to interact with their services directly through My Account.
- However, to keep the scope constrained, we will initially only provide links to existing experiences.

Families - Wills & Trusts, Personal Services

- In addition to business products, the new My Account needs to serve customers that purchase Personal products.
- This is out of scope given our initial focus, however we are designing and building My Account with all LegalZoom customers in mind. In addition, we will establish a design and tech contribution model.

Intellectual Property - Copyright, Trademark/ALTM

- In addition to business products, the new My Account needs to serve customers that purchase IP products.
- This is out of scope given our initial focus, however we are designing and building My Account with all LegalZoom customers in mind. In addition, we will establish a design and tech contribution model.

Measuring Success

Description of how the work aligns to the overall strategy and how we will measure the success of this initiative. Note: if testing is required, describe the testing plan in partnership with the testing team. Owner: PM

We believe a new, modern, responsive My Account will lead to happier customers and give LegalZoom the ability to increase speed to formation/completion and increase ongoing usage/value by providing better access to professionals and compliance services.

To measure effectiveness with the initial release, focused on LLC order status and tracking, we will measure:

- General status call volume reduction: estimated 3,000 calls eliminated monthly
- General status chat volume reduction: estimated 4,000 chats eliminated monthly

Event tracking plan: MA - Event Tracking - View Orders (separate internal page)

Tentative Timeline

Action Item	Owner	Date
Declare end-to-end feature set and merge prototypes	PM, Design	3/12
Complete tech analysis, including API audit	Engineering	3/12
Approve design and end-to-end experience	Sponsors	3/16
Create UX & UI specifications	Design, PM	3/19
Hackathon: Build real UI with fake APIs	Engineering, Team	3/22 to 3/26
Build APIs to support New My Account	Engineering, Team	TBD
Launch to first cohort of customers (first time LLC)	Team	TBD