Admin Center Provisioning Emails

IDENTITY: UX & PRODUCT

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What are provisioning emails?

- Notifications sent to users provisioned from the Admin Center
  - New users with either product entitlements –OR- admin permissions
  - Existing users with changes to products or permissions

Products included:

GoToMeeting
GoToWebinar
GoToTraining
OpenVoice
GoToAssist Remote Support

Volume:
(week of Feb 2-9 2020)

- 15,564 Total emails sent
- 11,169 Emails viewed
- 8,258 Welcome emails sent

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Existing Email Design - Examples

Dear Peter Rabbit,

Welcome! You have been added to the account for Easter Bonnet Inc. Your email address (mc-peter@jedix.com) is your username.

You have the following privileges:

- **GoToMeeting**
  - As a GoToMeeting organizer you can host meetings with screenshare, audio and video, anytime anywhere.

Get Started

If you have any questions about your account, please contact Bugs Bunny.

Regards,

Global Customer Support

https://support.logmeininc.com/meeting

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Dear m c,

Your account with John Spann LLC has changed.

The following privileges have been added:

- **RescueAssist**
  - As a RescueAssist Agent, you can hold unlimited hosted remote support sessions.
  - Check with your account administrator for additional features and functions.

The following privileges have been removed:

- **GoToMeeting**
  - As a GoToMeeting organizer you can host meetings with screenshare, audio and video, anytime anywhere.
- **GoToWebinar**
  - Host unlimited online webinars

Sign in to your account with mc-ov@jedix.com.

If you have any questions about your account, please contact us.

Regards,

Global Customer Support

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Dear Bugs Bunny,

Welcome! You have been added to the account for Easter Bonnet Inc. Your email address (mc-bugs@jedix.com) is your username.

You have the following privileges:

- **Admin Center**
  - Manage groups
  - Manage seats
  - Manage settings
  - Manage users
  - Create reports

Get Started

If you have any questions about your account, please contact Jack Rabbit.

Regards,

Global Customer Support

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Dear Peter Rabbit,

Welcome! You have been added to the account for Easter Bonnet Inc. Your email address (mc-peter@jedix.com) is your username.

Sales team,
You spoke... we heard you. Here is your GoToMeeting and GoToWebinar account. We hope this new tool helps you become even more of a success.
If there is anything else we can do to help, please let us know.

Joshua Seidel
Director of Cloud Operations, IT & Security

You have the following privileges:

- **GoToMeeting**
  - As a GoToMeeting organizer you can host meetings with screenshare, audio and video, anytime anywhere.

Get Started

If you have any questions about your account, please contact us.

Regards,

Global Customer Support

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What we have today – starting guidelines

- Product agnostic
- Transactional – free of spam trigger words; are not image heavy
- Broad email client support – HTML and text-only versions
- Must support:
  - New users
  - Existing users
  - Profile set up scenario
  - SSO sign in scenario
  - Multiple products
  - Admin customizations and company restrictions

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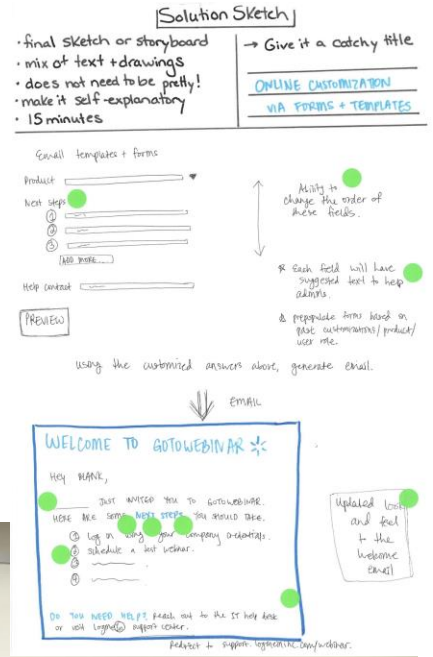
How do we know where we want to go?

- Design Sprint sketches
  - 17 participants from Account Services, Customer Success, Marketing, Engineering, Product Documentation, UX & Product
- 1:1 customer interviews
- Conversations with Marketing automation partners
- Competitive review



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Where we want to go – Additional design guidelines

- Inviting, pleasing visual design
- Conversational and inspirational language
- Brand recognition
- Connect transactional emails and nurture track emails

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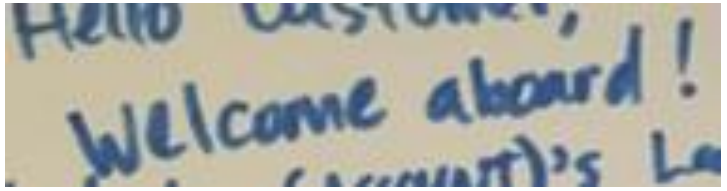
Language – themes from sketches

- Conversational and inspirational - "Let's do this!"
- "Welcome to the family"
- Natural language
- Active voice, first person



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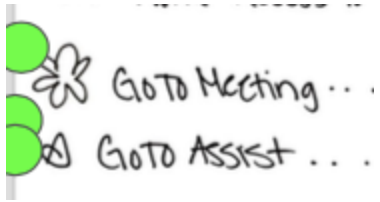
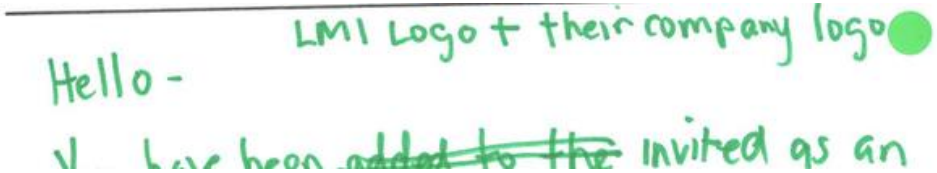
Branding - themes from sketches

- Reinforces who the email is from
- Associate the products with LMI company
- Use product logos





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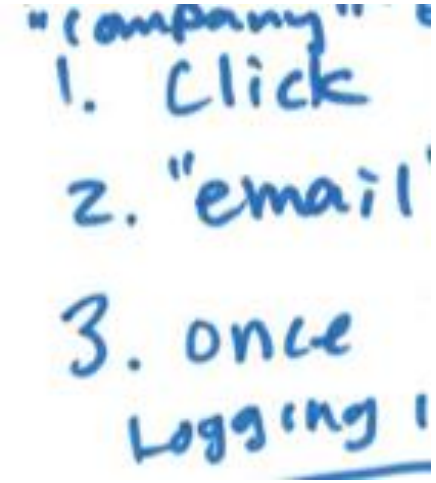
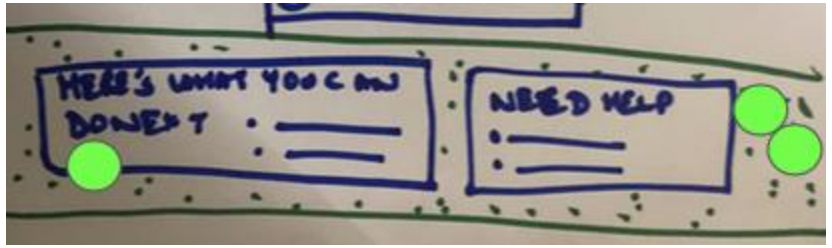
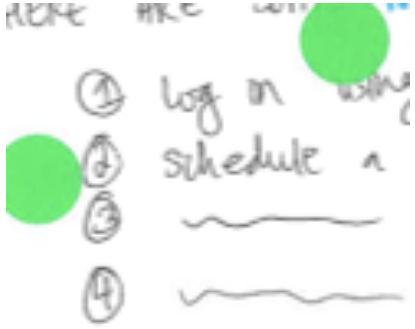
Layout – themes from sketches

- Sections for different content
- Lists







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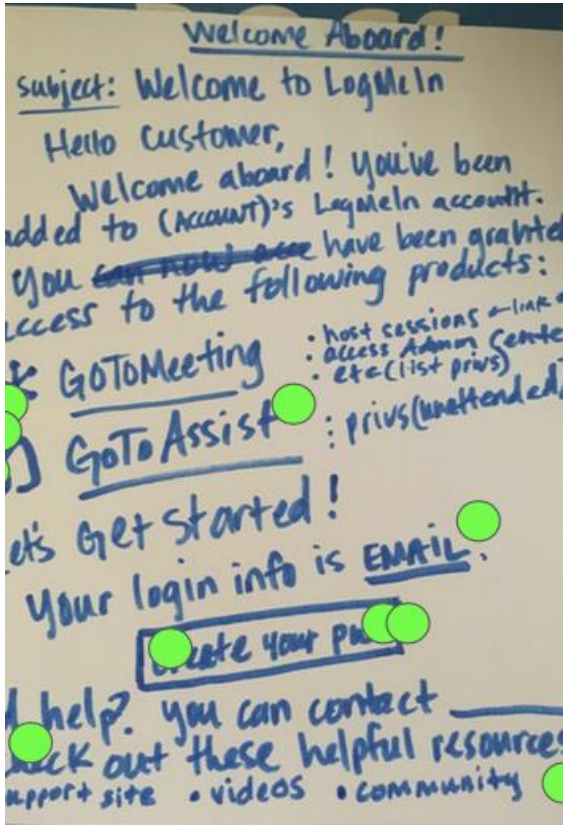
Differences – themes from sketches

- Location of CTA (at the top vs farther down)
- Directly highlighting/upsell features incompatible with customers that restrict feature usage
- Videos/training content



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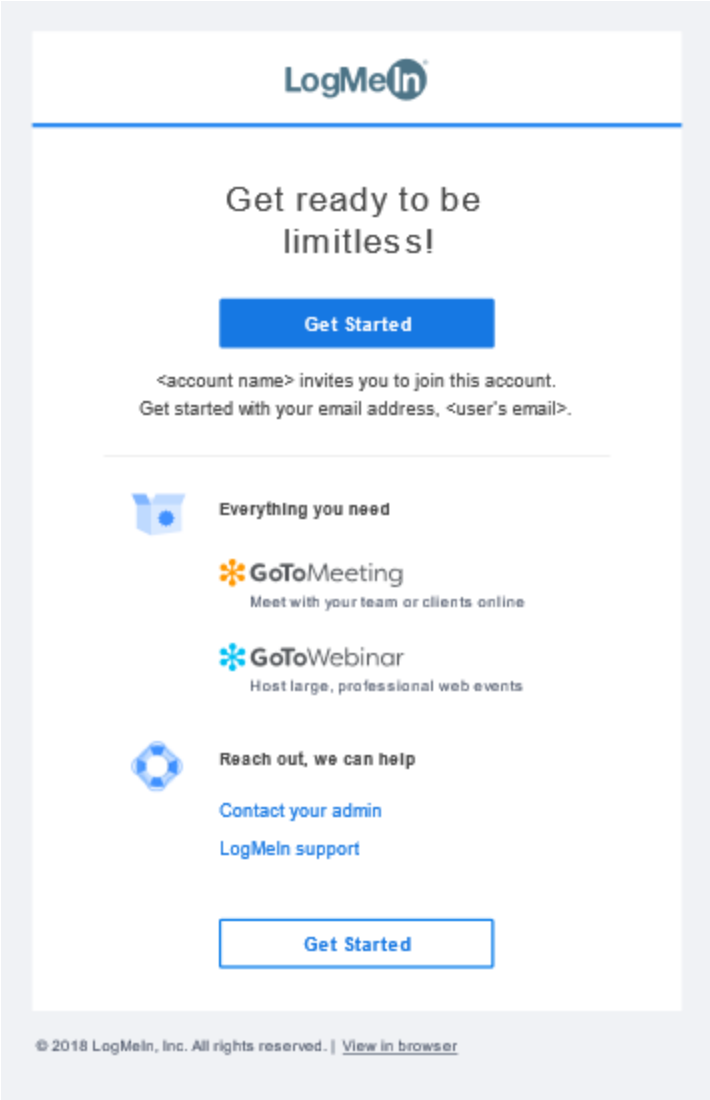
Proposed Design



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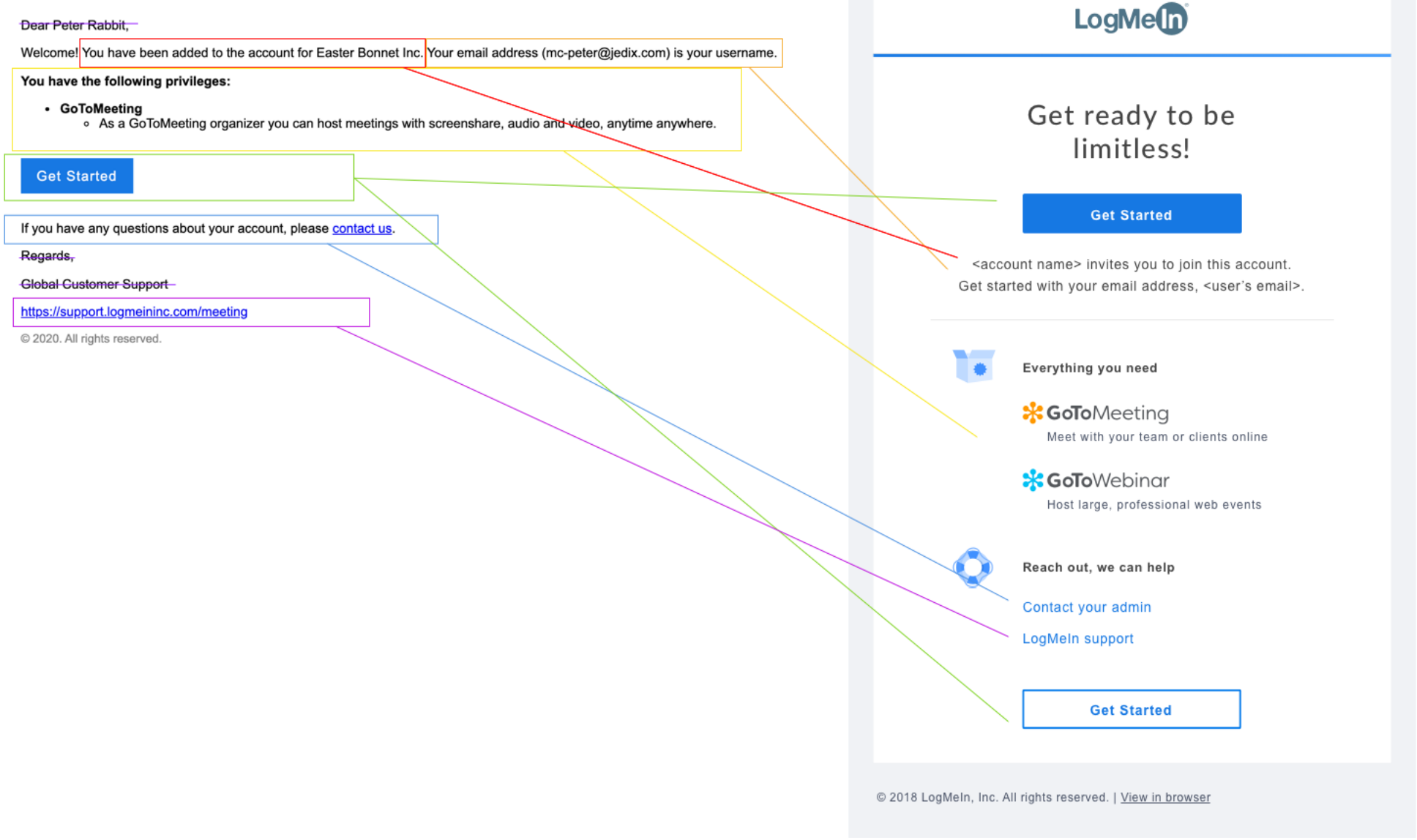
Old/New



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Appendix

EXAMPLE SKETCHING WORKSHOP

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Summary of sessions

- 3 sessions (2 in person, 1 remote)
- 17 Participants from across many customer touchpoints:
  - Account Services, Customer Success, Marketing, Engineering, Product Documentation, Design, & Product
- 20 Solution Sketches
  - Leverage the wealth of insights at the company
  - transform abstract ideas into concrete details
  - gather many ideas to define an ideal solution

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Design Jam: How To Play

Prompt: *"How can we improve the Admin Center Welcome Email?"*

Follow Google Design Sprint method:

- Not group brainstorming, instead individual sketching
  - Fastest and easiest way to transform abstract ideas to concrete detail
  - Generates lots of ideas
  - Work alone, together
- "But I can't draw!" - draw boxes and write text

PROCESS

12:00	Intro and Notes
12:15	4 sketches in 6 minutes
12:20	Solution sketch
12:35	Heat mapping
12:45	Speed critique

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Phase 1: “Notes”

Reflect & write it down - 10 min

- As we hear a few stories, jot down rough notes of the many ideas in your head
- Super quick, doesn’t need to be pretty
- You can start sketching or doodling

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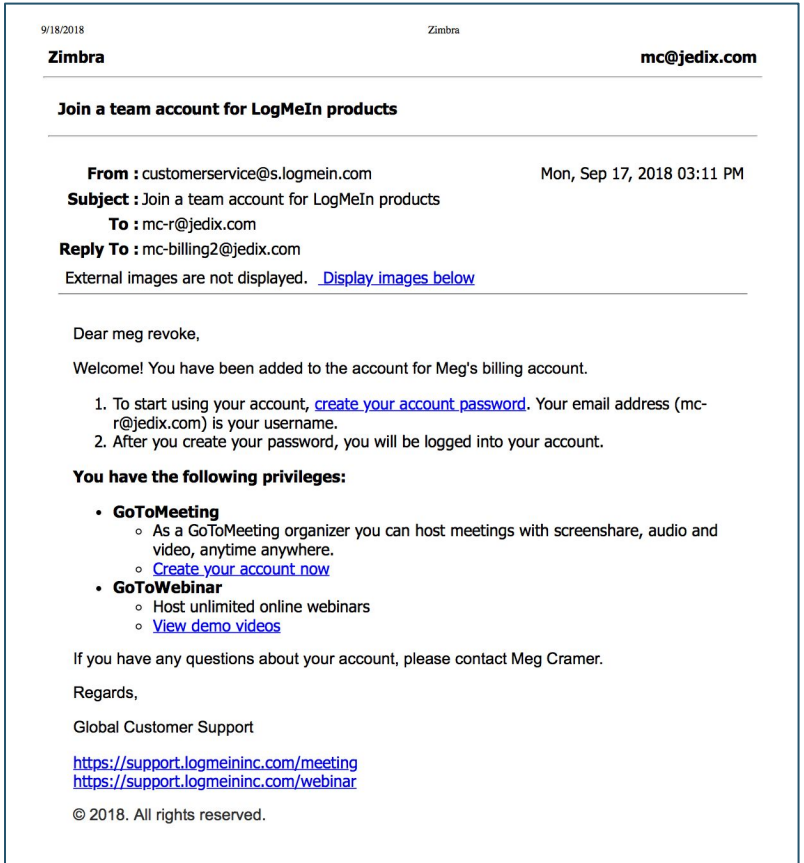
Customer stories

- We got a call from Zhi at Salesforce earlier this week. Zhi is the GoToMeeting Admin who provisions new employees with their accounts, but he's not the right person to contact if there is a problem. Zhi needs a way for an employee to file an IT ticket with the help desk instead of contacting him.



9/18/2018 Zimbra

Zimbra **mc@jedix.com**

Join a team account for LogMeIn products

From : customerservice@s.logmein.com Mon, Sep 17, 2018 03:11 PM
Subject : Join a team account for LogMeIn products
To : mc-r@jedix.com
Reply To : mc-billing2@jedix.com
External images are not displayed. Display images below

Dear meg revoke,

Welcome! You have been added to the account for Meg's billing account.

1. To start using your account, create your account password. Your email address (mc-r@jedix.com) is your username.
2. After you create your password, you will be logged into your account.

You have the following privileges:

- **GoToMeeting**
  - As a GoToMeeting organizer you can host meetings with screenshare, audio and video, anytime anywhere.
  - Create your account now
- **GoToWebinar**
  - Host unlimited online webinars
  - View demo videos

If you have any questions about your account, please contact Meg Cramer.

Regards,

Global Customer Support

https://support.logmeininc.com/meeting
https://support.logmeininc.com/webinar

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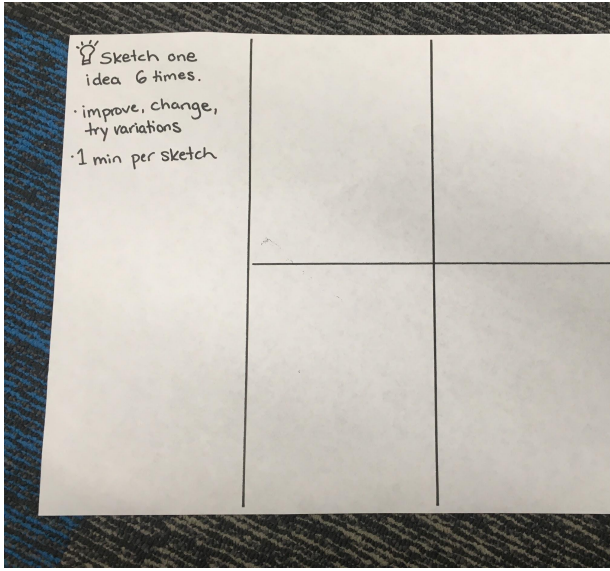
Phase 2: “4 in 6”

Pick an idea and run with it! - 6 min

- Pick one idea to move forward with
- Using the 4 spots on your paper, do 1 sketch a minute iterating on that idea (improving it, changing it, trying other variations…)
- Can be drawings, text, or a mix of both



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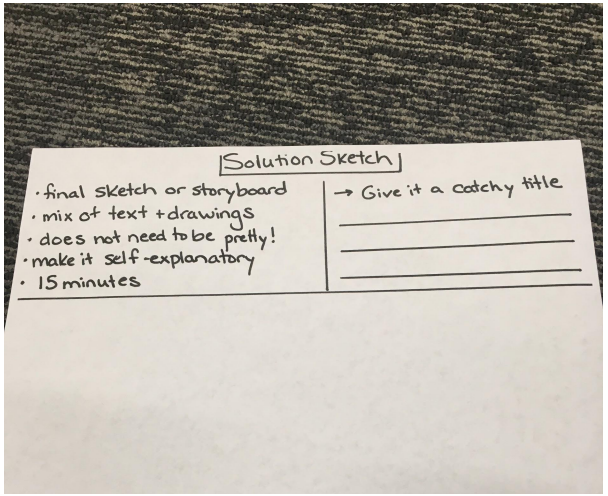
Phase 3: “Solution Sketch”

Show us your idea! - 15min

- Do a final sketch and/or storyboard of your idea
- Make it self explanatory
- Ugly is okay!
- Give it a catchy title
- Do not put your name on it
- Email or text a photo of it



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Phase 4: Heat map

Pick out faves - 10 min

- Everyone's "solution sketch" is posted in this deck
- Browse all the sketches and use a "green dot" to indicate stand-out ideas within sketches

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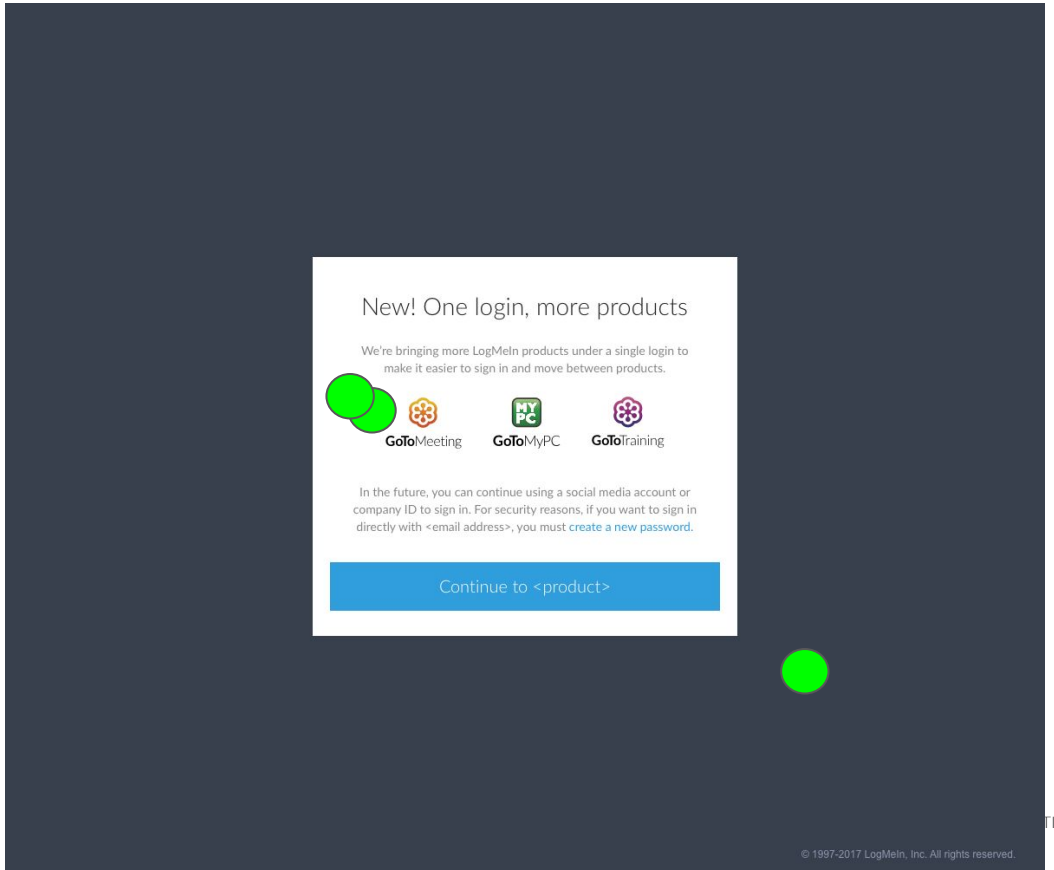
Copy/paste this green dot

Example



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Phase 5: “Speed Critique”

Summarize Ideas - 10 min

- Meg consolidates and points out standout ideas
- Others comment and discuss along the way
- At the end, creator describes anything missed

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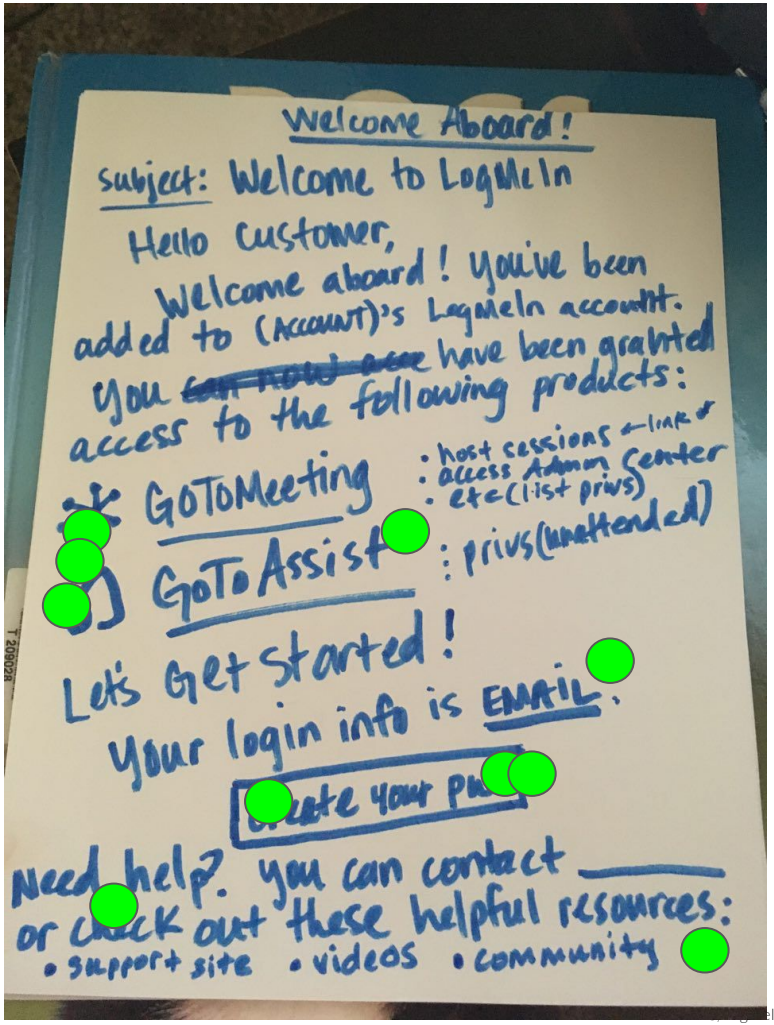

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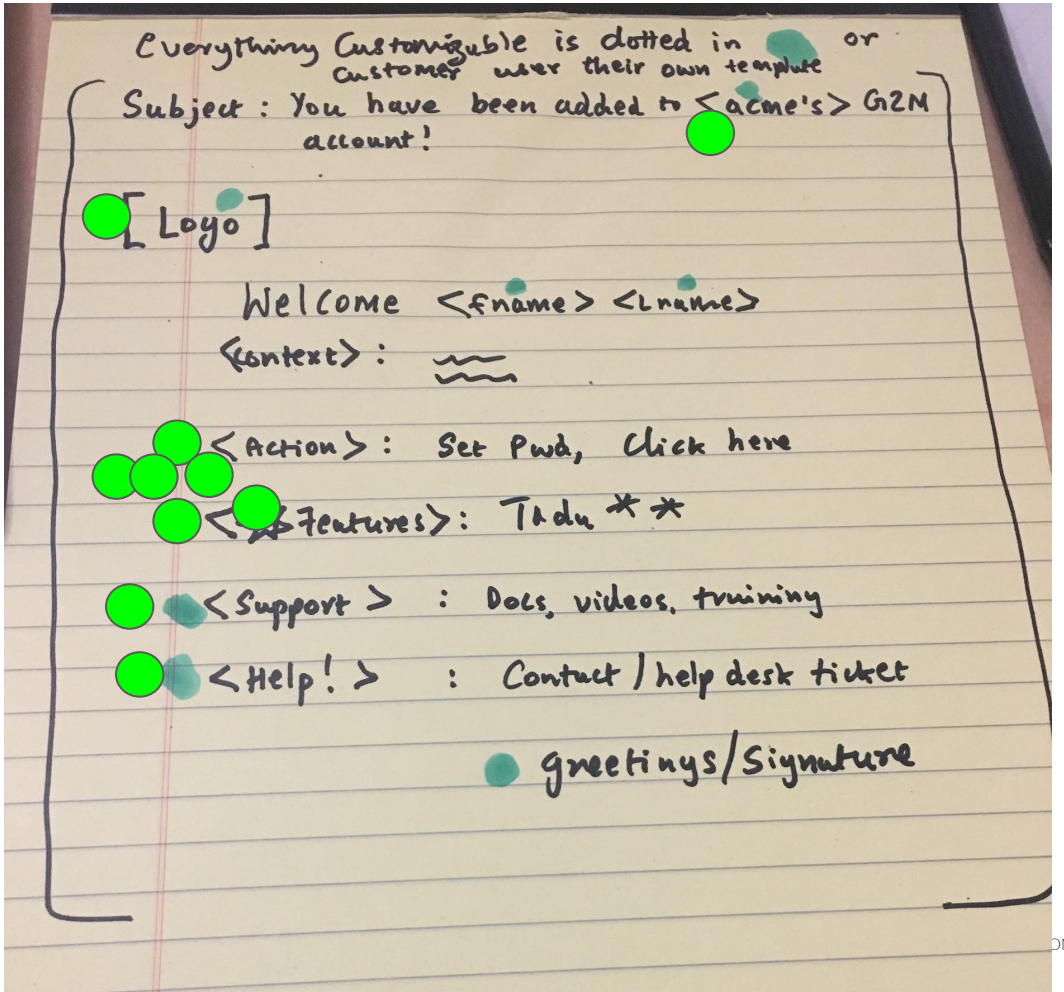

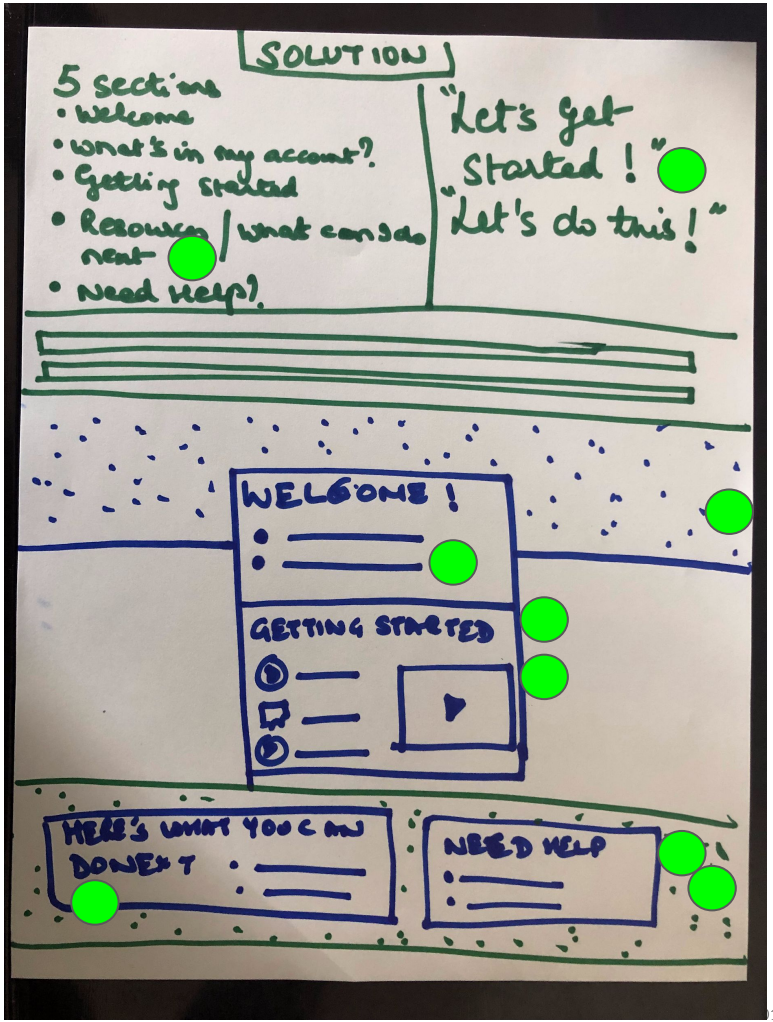
SOLUTION
5 sections
• Welcome
• What's in my account?
• Getting started
• Resources / what can I do next
• Need help?
"Let's get started!"
"Let's do this!"
WELCOME!
GETTING STARTED
HERE'S WHAT YOU CAN DO NEXT
NEED HELP

Customization Nation

Dear CUSTOMER NAME,

Welcome! ...

To get started log into your account using your email address and create a new password.

You have access to the following:

- GoTo Meeting...
- GoTo Assist...

customized content

Need Assistance?

+ Reach out to our support (LMI)
+ Enter a helpdesk ticket (customer)
+ attend a live training
+ visit our ~~[illegible]~~ knowledge base

quick tutorial videos

Admin Side

Coded language

Customization

Do you have a knowledge base URL to add

URL

text...

Do you have a link to your internal helpdesk?

URL

text

Additional Content

Add any of these videos:

getting... | host a... | unattended | etc. | etc.

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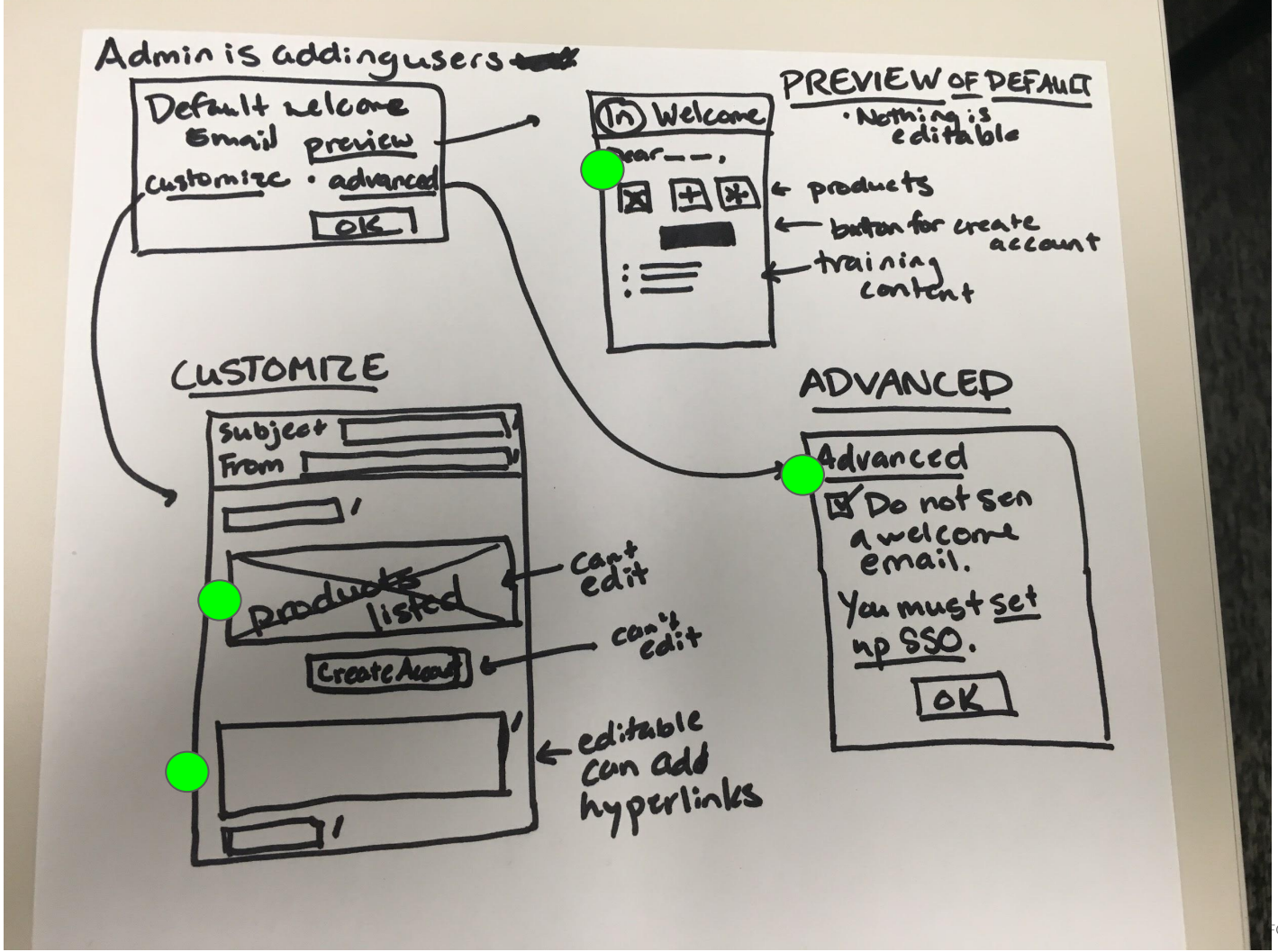

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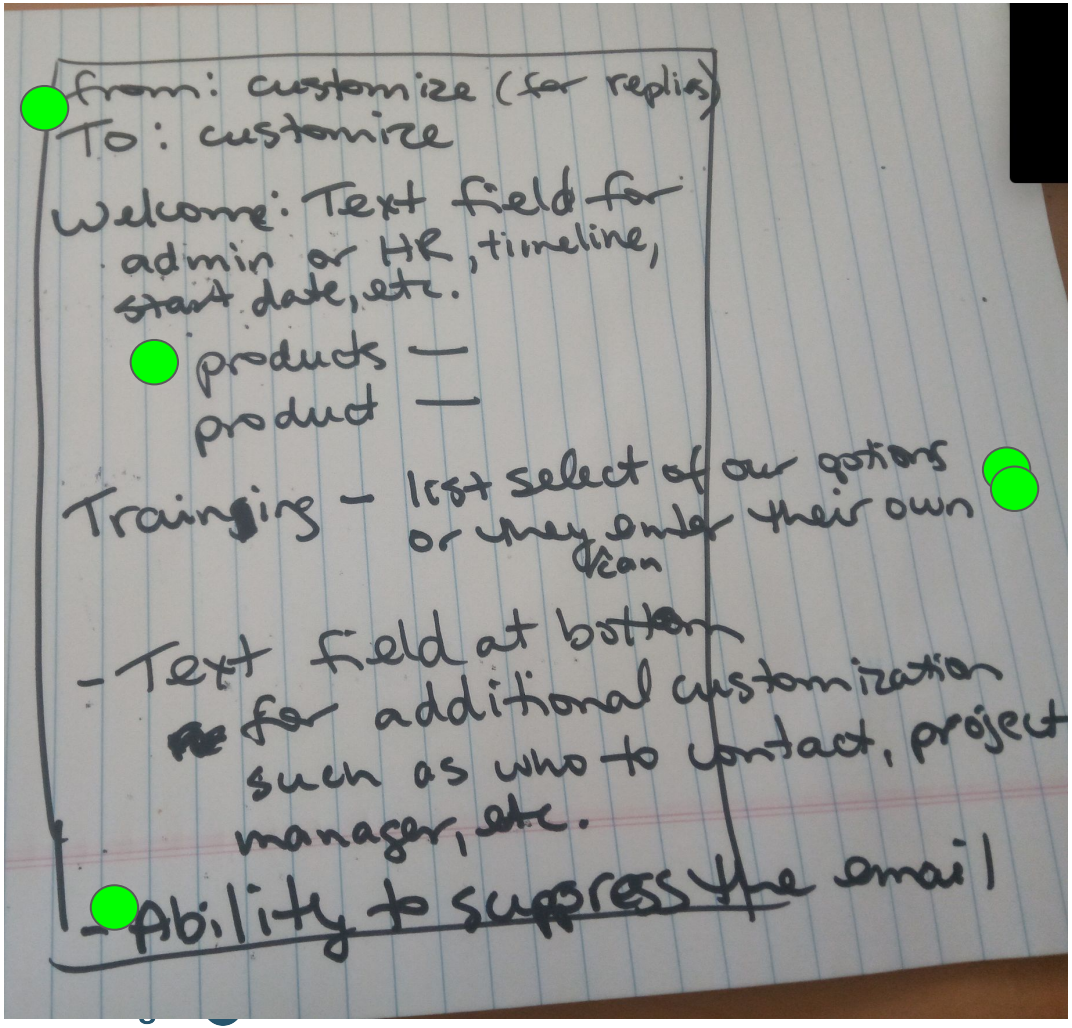

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