

Content design for SMB cancel save experiments in FY23

I created the content experience for the SMB (Small and Midsize Business) team's cancel save experiments, intended to help reduce the number of seats lost when customers cancel subscriptions. The Phase 1 experiment is now 100% live for 4 SMB SKUs.

Experiment results

- o Our goal was to save **22,000** seats in FY23 by making these changes.
- o We saved **32,785** seats for the fiscal year.

I contributed to these results by:

Exploring multiple options to save subscriptions

I collaborated with the SMB PM, design, and developers to explore and create effective, workable save elements to add to the cancel flow.

Using research to make decisions

By referencing existing cancel flow research and working with a researcher to create a customer study of our initial design explorations, we made informed decisions about how our design and content could best work together to help customers understand their alternatives to canceling.

Improving the overall cancellation experience

While working on the save elements, I also took the opportunity to use research and discussions with CELA (our legal team) and Commerce PMs to create clearer, friendlier, more concise content within the cancel flow itself, to help customers better understand their cancellation options.

I worked with these teams for this project:

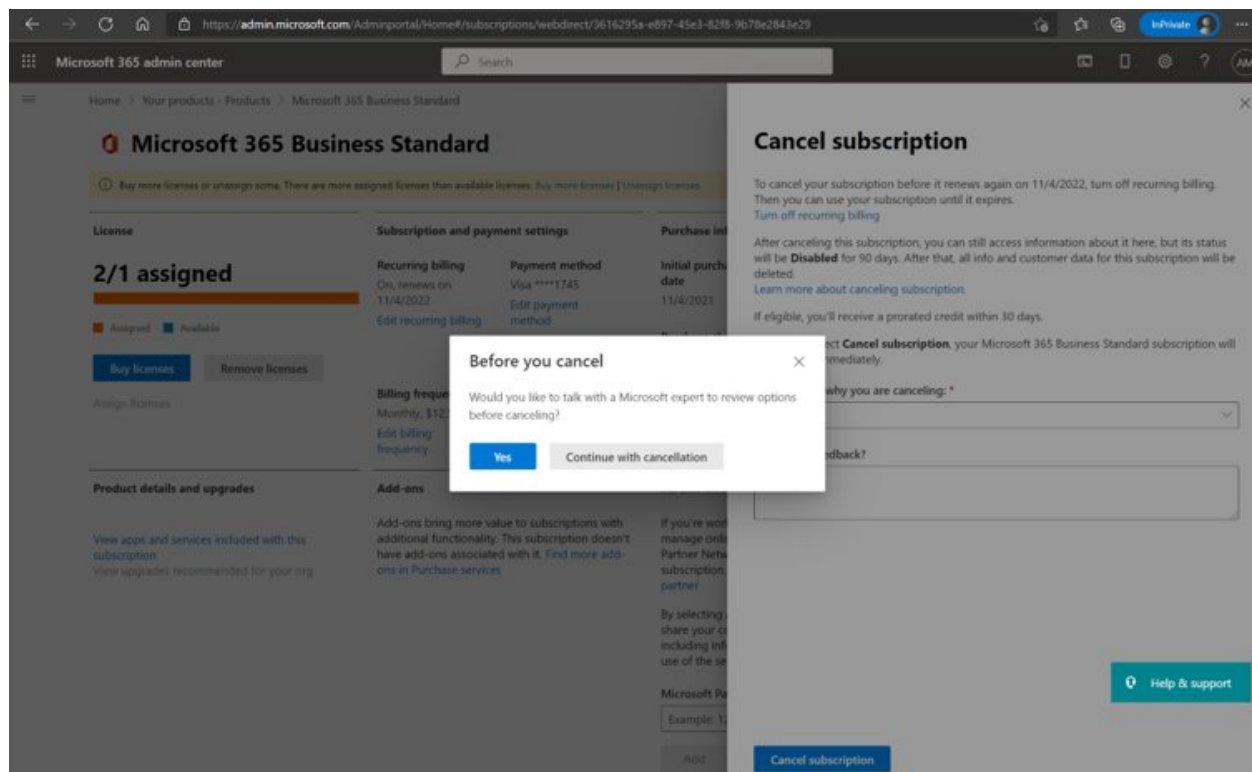
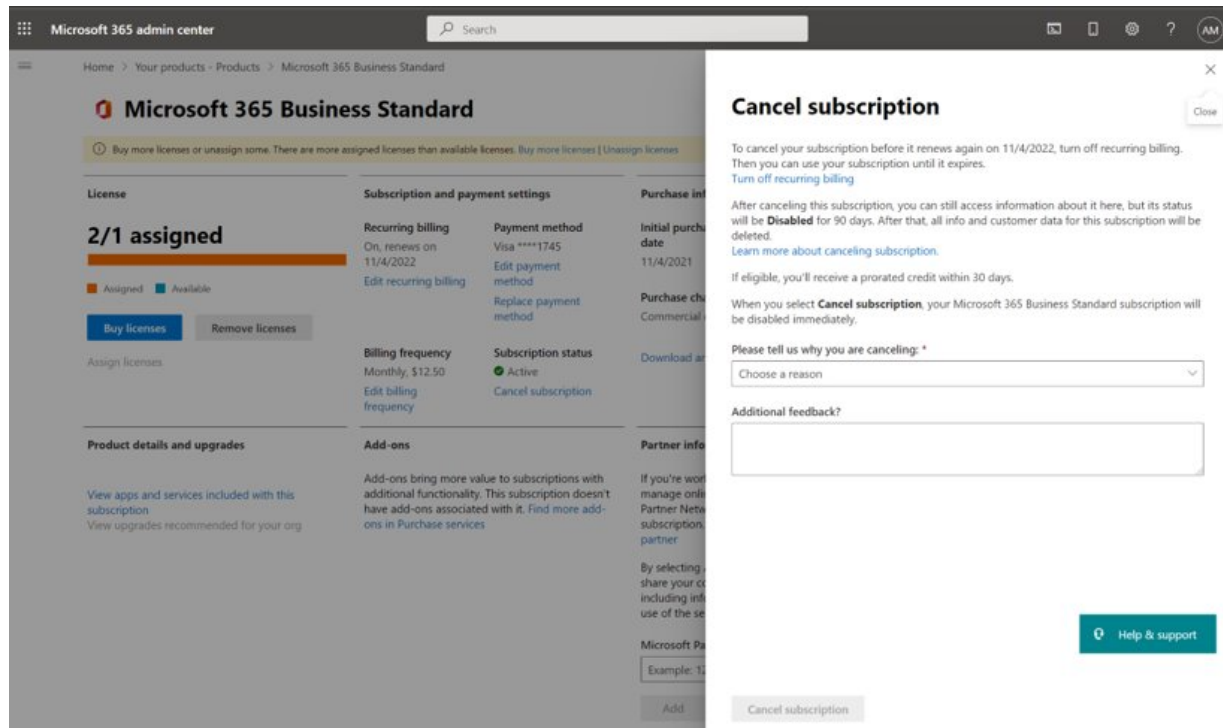
- PMs - SMB and Commerce
- Commerce Design
- Commerce Research
- Existing research reports
- CELA legal team
- Commerce and SMB devs

My content design process for this project:

- Digging deeper into the Amplify team's plan and original PM art, asking their PM many questions to better understand the goals and why they chose the paths included in their PM art to reach those goals

- Looking at existing research in HITS and from Commerce researchers to gather customer pain points in the current cancel flows
- Gathering example cancel experiences from other e-commerce sites to see if other teams had solved similar issues
- Talking with CELA to better understand why "recurring billing" is a required term, and to figure out how to best write around it to make cancel options clearer
- Examining ongoing design/content explorations within Commerce, and apply both design and content patterns to what SMB has requested
- Setting ongoing meetings and discussions with PM to pare down the PM art to start building a design that fits our design and content patterns
- Also using those meetings to cut the experience down to include just a few actions and simpler, shorter, friendlier language to help decision-making less overwhelming
- Talking with SMB and Commerce devs to find out what elements could reasonably be changed for the scope of this experiment, and which could not
- Discussing essentials with design and finding compromises on what can and should be included in our proposed flows, based on all of the information above
- Continuing to advocate for simplifying the designs even more as the process continued, but also knowing when to finally disagree and then commit to the elements the PM wanted to keep and test (the videos thumbnails)
- Sharing our Figma explorations with PMs, as well as other designers and content designers to get feedback and suggestions
- Taking part in design and content reviews in both SMB and Commerce as v1 work was nearing completion, to get feedback from the wider organizations
- Once the v1 design was approved, we created accessibility markup for the flows and shared with the accessibility team for review
- Participating in a bug bash to note where design and code differed, and filed bugs to fix those differences when needed

Screenshots of the existing cancellation process



Microsoft 365 admin center

Search

Home > Your products > Products > Microsoft 365 Business Standard

Microsoft 365 Business Standard

Microsoft 365 Business Standard was disabled. Your data will be deleted on 3/15/2022. [Reactivate now](#) | [Learn about subscription status](#)

Buy more licenses or unassign some. There are more assigned licenses than available licenses. [Unassign licenses](#)

License

2/1 assigned

Assigned

Available

Assign licenses

Subscription and payment settings

Recurring billing

Off

Edit recurring billing

Payment method

Visa ****1745

Edit payment method

Replace payment method

Billing frequency

Monthly, \$12.50

Edit billing frequency

Subscription status

Disabled

Delete subscription

Reactivate subscription

Purchase info

Initial purchase date

11/4/2021

Purchase channel

Commercial

Product details and upgrades

View apps and services included with this subscription

View upgrades recommended for your org

Add-ons

Add-ons bring more value to subscriptions with additional functionality. This subscription doesn't have add-ons associated with it. [Find more add-ons in Purchase services](#)

Partner info

If you're working with a partner, you can manage only Partner Network subscriptions with your partner.

By selecting a partner, you share your contact information, including information about the use of the service.

Microsoft Partner ID

Example: 1234567890

Cancel subscription

Updated successfully!

Help & support

Cancel subscription

Screenshots of the version 1a experiment cancellation process

The screenshot shows the Microsoft 365 admin center interface. The left sidebar contains navigation links: Home, Users, Devices, Groups, Roles, Resources, Billing, Support, Settings, Setup, Reports, Health, Admin centers, and Security. The main content area displays the 'Microsoft 365 Business Standard' subscription details. It shows 'Licenses assigned' as 75/100, with a bar chart indicating 75 assigned and 25 available. The 'Subscription and payment settings' section shows the recurring billing date as 11/12/2022, the payment method as Visa ****9026, and the subscription status as Active. The 'Product details' section describes the features of the subscription. The 'Partner information' section provides instructions on how to add a partner. A modal window titled 'Options for canceling your subscription' is open on the right, showing two options: 'Cancel now' and 'Cancel before the next renewal date'. The 'Cancel now' option is selected. Below the modal, there are sections for 'When your subscription expires' and 'Explore features already included in your subscription'.

Options for canceling your subscription

Do you need to cancel now, or would you like to let the subscription expire?

☒ **Cancel now**
Cancel your subscription now and stop using its services immediately. This option is available until October 11, 2022. You'll get a pro-rated refund if eligible.

☐ **Cancel before the next renewal date**
You've paid for this subscription through November 12, 2022. Turn off recurring billing to stop the subscription from renewing again. You can then keep using the subscription until it expires.

[Learn more about canceling subscriptions](#)

Talk to a Microsoft 365 expert
Before canceling, they'll help you evaluate the options that work best for your organization.

When your subscription expires, your organization will lose access to apps and services including:

- 1 TB of Cloud storage**
Store and share your organization's files with 1 TB of OneDrive storage
- Office apps**
Create your best work with Word, Excel, PowerPoint, and Outlook
- Security**
Protect your organization's email and data against security threats

Explore features already included in your subscription

- You'll find the full Word, Excel, and PowerPoint mobile experiences in just one app: Office**
Get work done on any device
- Create appointments and meetings**
Manage appointments and meetings
- Get started with Teams**
Stay connected with meetings and chat

[Next](#)

The screenshot shows the Microsoft 365 admin center interface, similar to the previous one, but with the 'Tell us why you're canceling your subscription' modal window open on the right. The modal window has a title 'Tell us why you're canceling your subscription' and a subtitle 'Help us improve the experience for everyone by sharing the reason you're canceling.' It contains a 'Reason for canceling' dropdown menu with the option 'Choose a reason' selected. Below this is a text input field for 'Any additional feedback?'. A 'Cancel now' button is located at the bottom right of the modal window.

Tell us why you're canceling your subscription

Help us improve the experience for everyone by sharing the reason you're canceling.

Reason for canceling

Any additional feedback?

[Cancel now](#)

Microsoft 365 admin center

https://admin.microsoft.com

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Security

Home > Your products > Microsoft 365 Business Standard

Microsoft 365 Business Standard

This subscription is disabled until September 11, 2022, when your data will be deleted. [Reactivate now](#) | [Learn more about subscription statuses](#)

Licenses assigned

75/100 assigned

Assigned

Available

Buy licenses

Remove licenses

[Assign licenses](#)

Subscription and payment settings

Recurring billing

Off

[Edit recurring billing](#)

Billing frequency

Yearly, \$1,250.00

[Edit billing frequency](#)

Payment method

Visa ****9026

[Edit payment method](#)

[Replace payment method](#)

Subscription status

Disabled

[Delete subscription](#)

[Reactivate subscription](#)

Product details

With Microsoft 365 Business Standard, host email, store and share files, and access apps across devices to manage your business... [View details](#)

[Change to a different plan](#)

Partner information

If you're working with a partner to help you buy or manage online services, enter their Microsoft Partner Network ID to associate them with this subscription. [Learn more about working with a partner](#)

Add-ons

Add-ons bring more value to subscriptions with additional functionality. This subscription doesn't have add-ons associated with it. [Find more add-ons in Purchase services](#)

Your subscription has been canceled

Users no longer have access to their data, but admins can access the subscription's data for the next 90 days while it is in the disabled state. After that, all of the subscription's information and customer data will be deleted.

If eligible, you'll receive a prorated refund on your final invoice in about 30 days.

If your business needs change, you can reactivate the subscription to start using it again.

[Reactivate this subscription](#)

More options

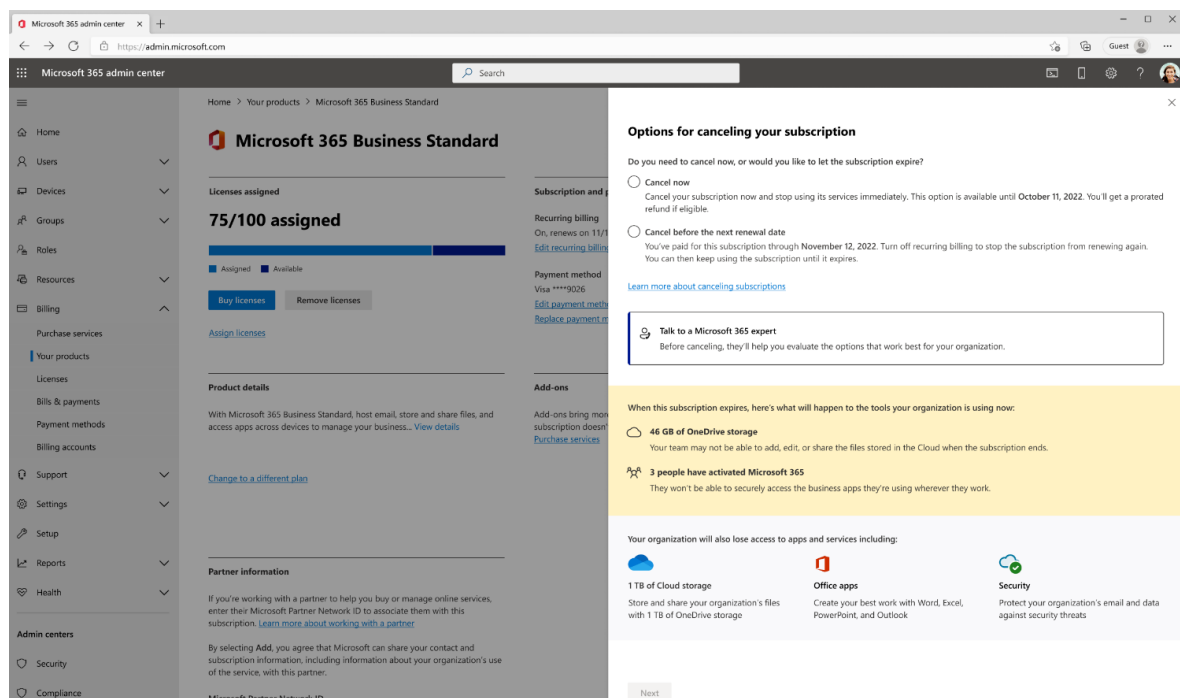
[Manage your subscriptions](#)

[Learn more about subscription statuses](#)

Updates to version 1a experiment

After version 1a launched, the SMB team found that the video thumbnails had very low clickthrough rated and devs were also finding technical issues related to playing the videos. We created an updated design for version 1b that removed the videos, added benefits personalized to each organization's data, and ultimately increased the experiment's technical load time and overall success.

Version 1b



What's next?

Our content design work with the SMB team for the phase 2 experiments is nearly complete and is launching incrementally. The goal is to increase the cancel save rate by 1% in two SMB SKUs by using recommendations in response to the reason they select for cancellation.

