# 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.
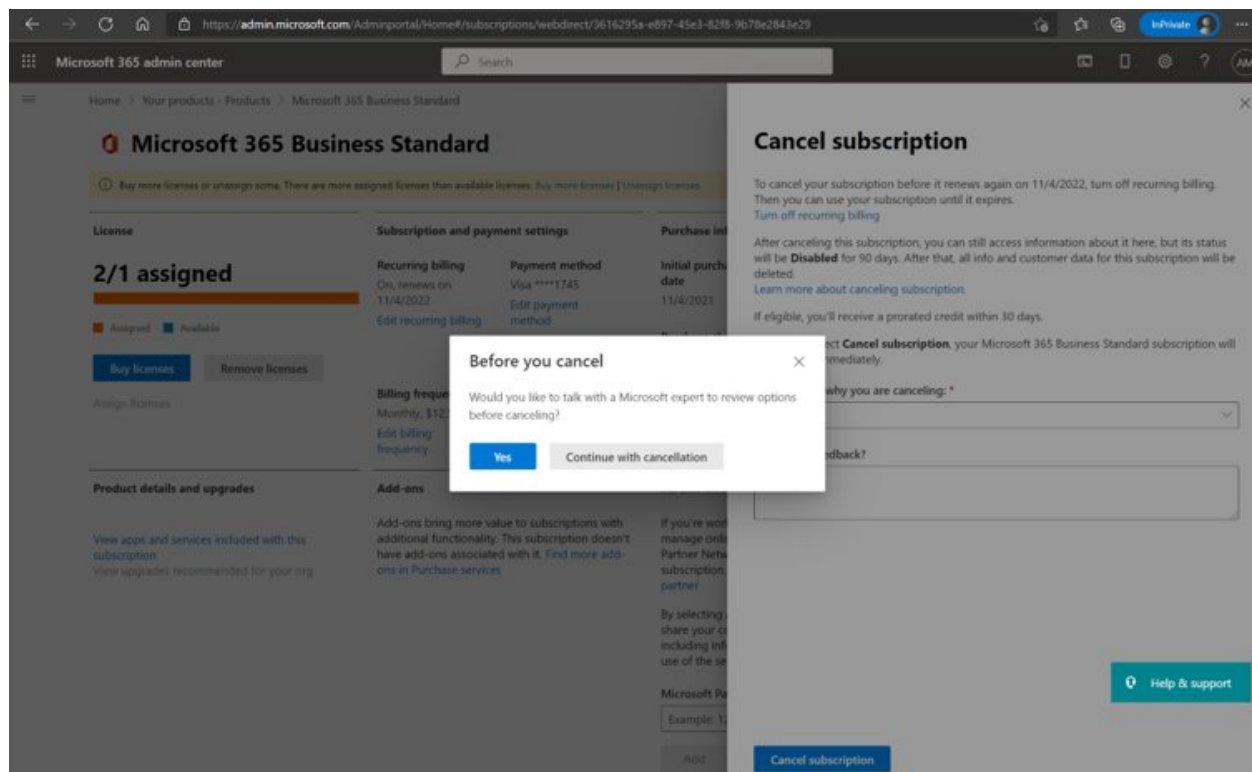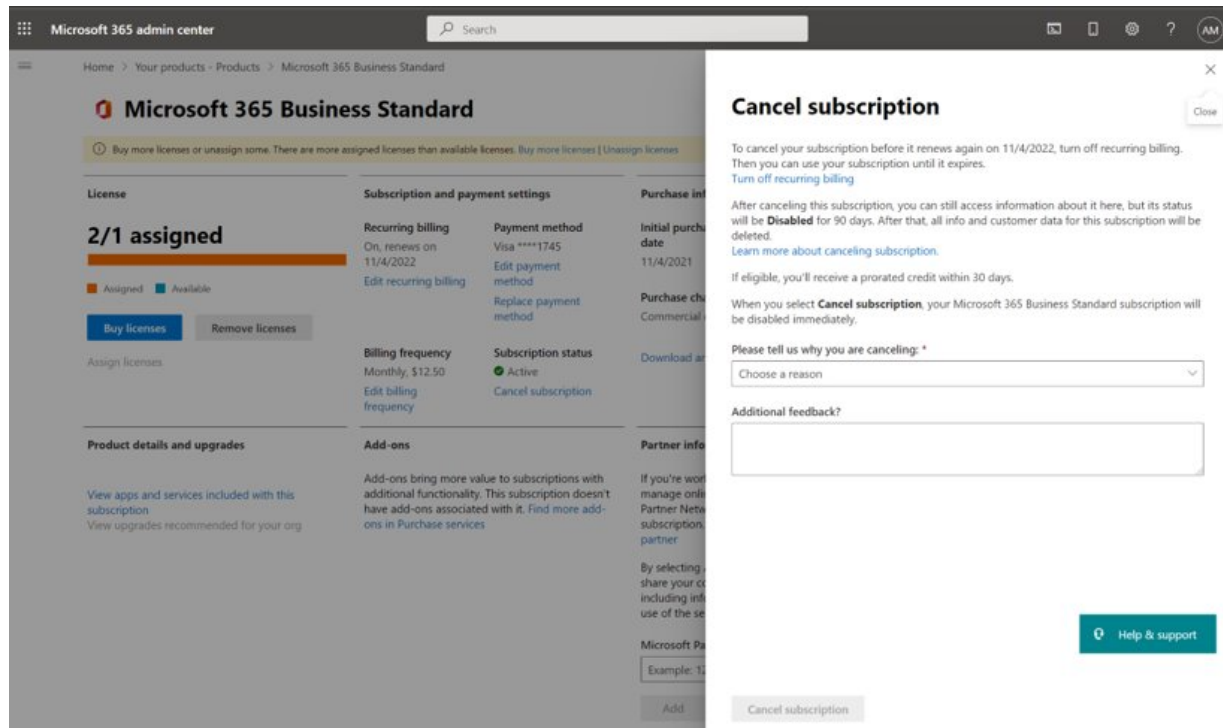
## I worked with these teams for this project:

- 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

🔍 Search

# 🟧 Microsoft 365 Business Standard

ⓘ Microsoft 365 Business Standard was disabled. Your data will be deleted on 3/15/2022. Reactivate now | Learn about subscription statuses

ⓘ 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 inf**

Initial purch
date
11/4/2021

Purchase cha
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 wor
manage onli
Partner Netw
subscription.
partner

By selecting
share your c
including inf
use of the se

Microsoft Pa

Example: 12

---

✕

# Cancel subscription

✅ Updated successfully!

🛟 Help & support

Cancel subscription

# Screenshots of the version 1a experiment cancellation process

Microsoft 365 admin center     🔍 Search

☰

- 🏠 Home
- 👤 Users
- 🖥 Devices
- 👥 Groups
- 🔑 Roles
- 📁 Resources
- 💳 Billing
  - Purchase services
  - Your products
  - Licenses
  - Bills & payments
  - Payment methods
  - Billing accounts
- 💬 Support
- ⚙ Settings
- 📐 Setup
- 📊 Reports
- ❤ Health

**Admin centers**

- 🛡 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

**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

**Subscription and payment settings**

| Recurring billing | Billing frequency |
|---|---|
| Off | Yearly, $1,250.00 |
| Edit recurring billing | Edit billing frequency |

| Payment method | Subscription status |
|---|---|
| Visa ****9026 | 🔴 Disabled |
| Edit payment method | Delete subscription |
| Replace payment method | Reactivate subscription |

**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**
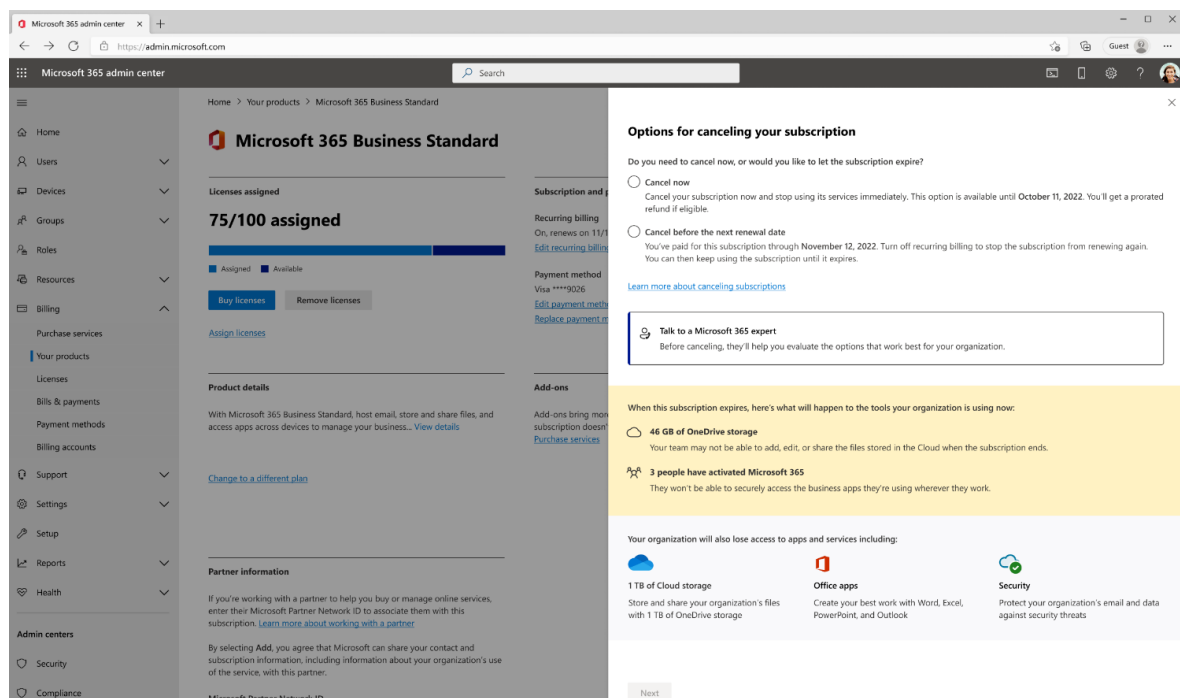
# What's next?

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.