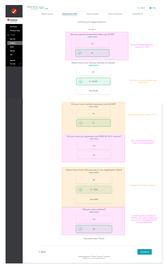
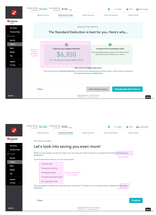
Good: Make current experience compliant for TY18

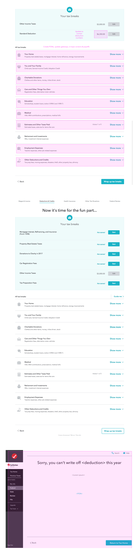
SVI



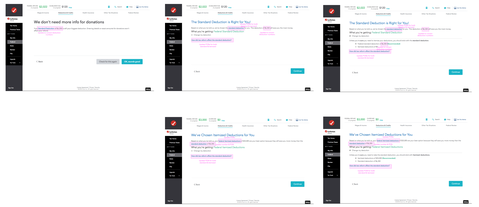
SVI recommendation



Landing table



SVI commit



During States experience

Better: optimize FUD stemming from Tax Reform

Hypothesis:
Customers will have a better deduction entering experience with some sort of priming to understand what impacts their deductions, especially if they're going from itemized to standard

Intercept customers about SVI & D&C changes before landing table
- Inform customers they start out with the standard deduction, and refund will utilize that deduction until the itemized topics go above it

If you're not eligible to go through SVI (didn't itemize PY or we don't have PY data)

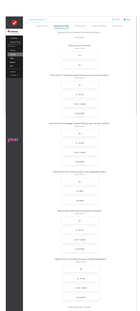
If you're not eligible to go through SVI (didn't itemize PY or we don't have PY data)

Upleveled SVI for customers who we're able to recommend upfront

If you're eligible to go through SVI

Hypothesis:
By making the SVI recommendation model more granular with calculations, TurboTax can serve up more accurate, confidence-inspiring recommendations by pointing to specific topics and gauging their impact on the return, especially in the lens of tax reform & YoY situations.

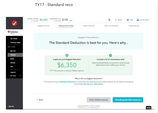
SVI loader



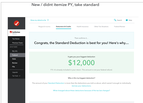
Hypothesis:
By comparing standard and itemized, as well as comparing PY #s and CY projections, we can give the customer more confidence that our recommendation is the right one for them & it will reduce FUD, especially for customers who are used to itemizing but should take standard this year

Show the breakdown why we recommend Standard vs Itemizing

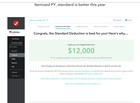
TY13 - Standard reco



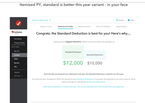
New / didn't itemize PY, take standard



Itemized PY, standard is better this year



Itemized PY, standard is better this year variant - in your face



Itemized PY, standard is better this year variant - PY and CY comparison

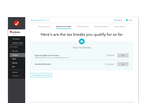
TY17 - Itemized reco

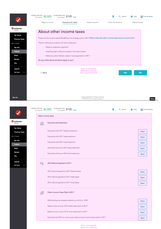
Recommend itemizing this year

Variant - side by side in your face

Hypothesis:
By updating how we frame Other Income Taxes and reorganizing the content inside the topic such that we are able to move items you cant deduct to Other Tax Situations, we can better frame this as how this affects your tax breaks and not have collusion issues with how we frame deductions & credits

Update "Other Income Taxes" topics & UX for it
- FUD clash when the amount is higher than deductions OR move it to OTS

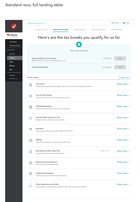




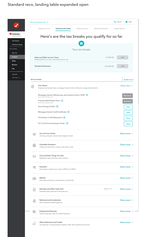
Hypothesis:
By noting which topics are for itemized deductions, we're better able to communicate to customers which topics they went need to touch since they're taking standard OR if they're itemizing, they have a better understanding which topics are above the line vs itemized.

Breadcrumb topics that are affected by Tax Reform (landing tables, MyStuff)

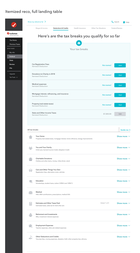
Standard reco, full landing table



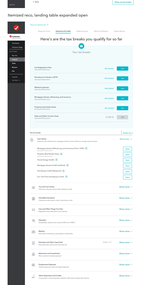
Standard reco, landing table expanded open



Itemized reco, full landing table



Itemized reco, landing table expanded open



Hypothesis:
By shifting when we communicate to the customer that they're better off taking itemized over standard from post D&C to in topic, we should create a more cohesive, cause-and-effect payoff for the customer in crouching the SVI decision point in the context of an itemized deduction, reducing FUD around how TurboTax communicates the best deduction for the customer while compartmentalizing SVI from other D&C.

Further, we should be able to communicate the affects of tax reform more effectively by threading in the impacts of the reform as customers go through the itemized topics.
Align SVI decision making point closer to decision making point & modernize it show a breakdown of numbers
Refine big swing payoffs & disqualifiers (Casualty loss, Property Taxes, Mortgage Interest, Medical Expenses, Job Related Expenses)

Current Moneyball when itemizing

Current Moneyball when taking standard

Celebrate moment of crossing the threshold concept

Standard moneyball concept

Best: Reimagine SVI & D&C while we're at it

Hypothesis:
By reimaging how we handle MyStuff, we should be able to more strongly frame and pay off the topics customers end up going through for SVI and give customers a way to understand how each topic impacts their return

Show a version of SVI that utilizes more GTKM-esque info capture so SVI expands beyond to above the line deductions & credits

Hypothesis:
By reimaging how we handle MyStuff, we should be able to more strongly frame and pay off the topics customers end up going through for SVI and give customers a way to understand how each topic impacts their return

Clarify where customers are in the journey of taking standard or actual expenses
- reflect standard deduction/itemized deduction grouping in landing table/MyStuff
- indicate once the customer crosses over the SVI threshold (conditional bookend moment)

Hypothesis:
By adding content to Guide Me around what are itemized deductions, we reduce the likelyhood of the customer going through the topic when its not relevant to them

Optimize Guide Me for Standard & Itemized Deduction

Add descriptor for Itemized Deduction

If standard reco, withhold Guide Me for itemized topics and reframe how we discuss it

Hypothesis:
By creating a stronger Hero Moment, we give the customer a moment to understand that TurboTax is doing work for them through our SVI recommendation experience.

Create Hero Moment around SVI recommendation point

Hypothesis:
This screen does not feel relevant for customers filing in 2018, that it's shown to all customers without understanding if they're even in a position to be eligible for the Homebuyer Credit

Remove Homeowner credit page after landing table
- not relevant for customers who dont own a home or didn't buy a home before 2008