

Trades Research insights

Quote optimisation and uplift

Agenda

01

Research session

Demographics we sought for in our user participants, and the approach we took.

02

Study overview

Designs and various tasks we tested.

03

Key themes

Outline of key insights, pain points and delight points.

04

Recommendations

Overview of iterations that can be made for an enhanced and intuitive customer experience.

Research session

How we tested

We ran 45 minute sessions with each participant - testing and validating the effectiveness of our Trades optimisation and uplifted mobile screens.

Interviews were conducted on 8 September to 13 September.

Facilitators and note takers were David, Anzhelika, James, Leyla and Fei

Who we tested

To understand if the experience being uplifted makes sense to our customer base and aligns with users' expectations, we interviewed 7 people who:

- Worked part time or full time
- Have booked a Tradie online in the last 12 months
- Were evenly split between males and females
- 50% have used RACV Trades



Participant 2



Participant 1



Participant 3



Participant 4



Participant 5



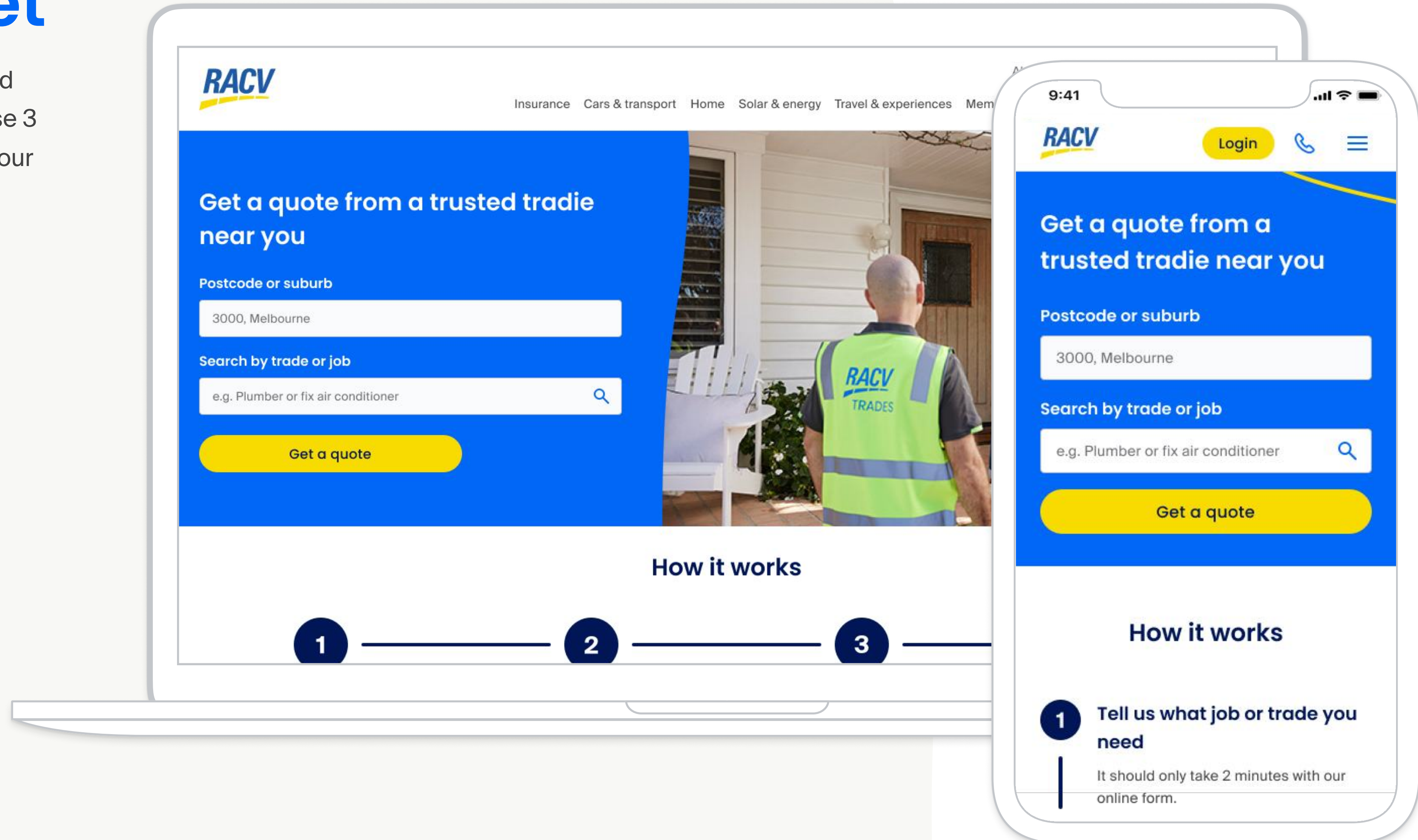
Participant 6



Participant 7

Search widget

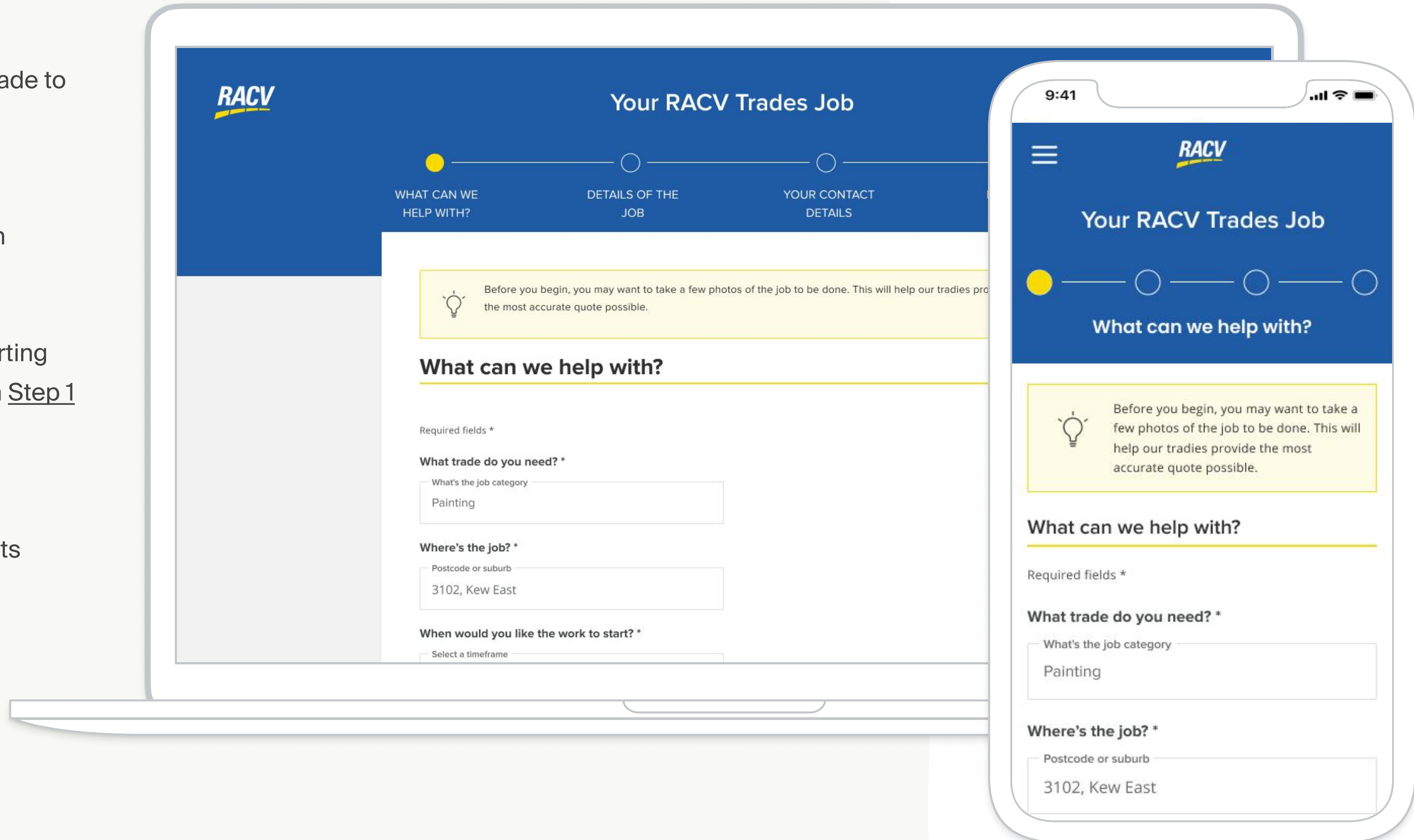
Our goal was to validate the redesigned search widget introduced in AEM Phase 3 and assess how well it resonated with our participants in terms of its design and usability.



Submit a job

We tested the latest enhancements made to the job submission flow:

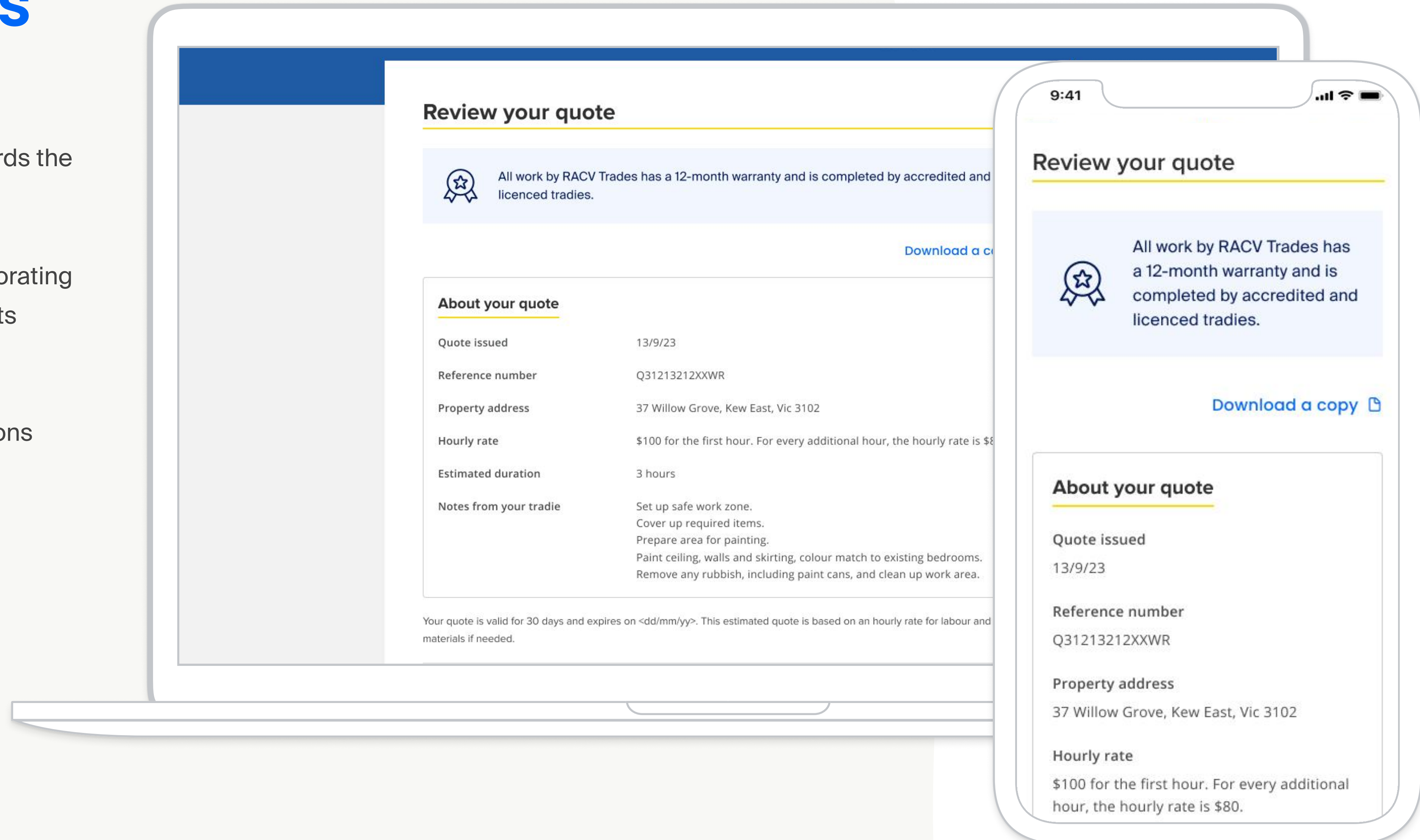
- The new 25-character limit on job description and the revised copy on uploading photos – Quick wins.
- The revised copy on the banner alerting users to take a photo beforehand in Step 1 and trade-specific hint text in Step 2 – A/B test.
- The Heritage overlay question and its relevance to each of the seven new categories.



Hourly quotes

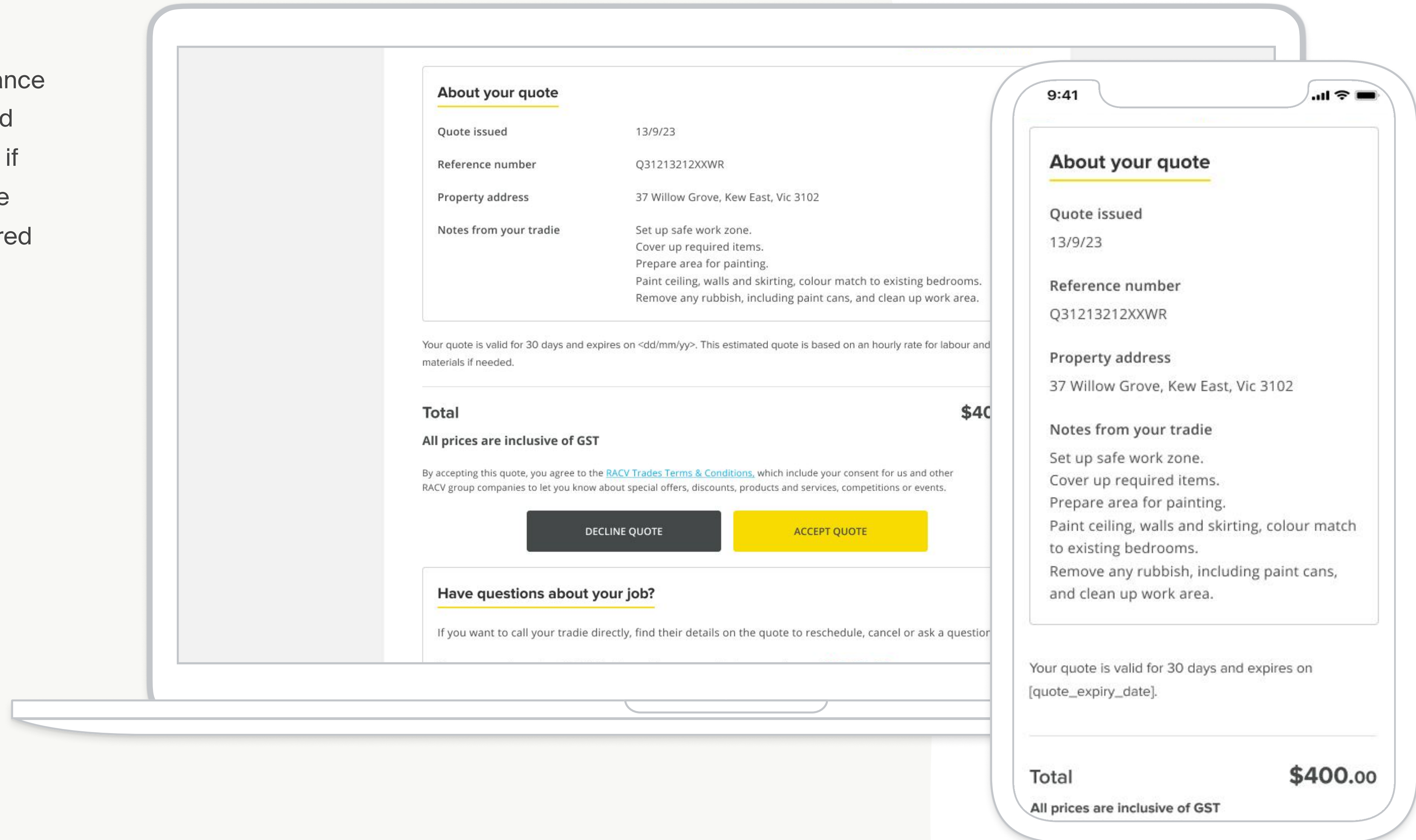
Our goal was to:

- Evaluate customer sentiment towards the updated hourly quote screens.
- Assess the effectiveness of incorporating the value proposition component, its impact on purchasing decisions.
- Gain insights into any misconceptions about hourly quote terms.



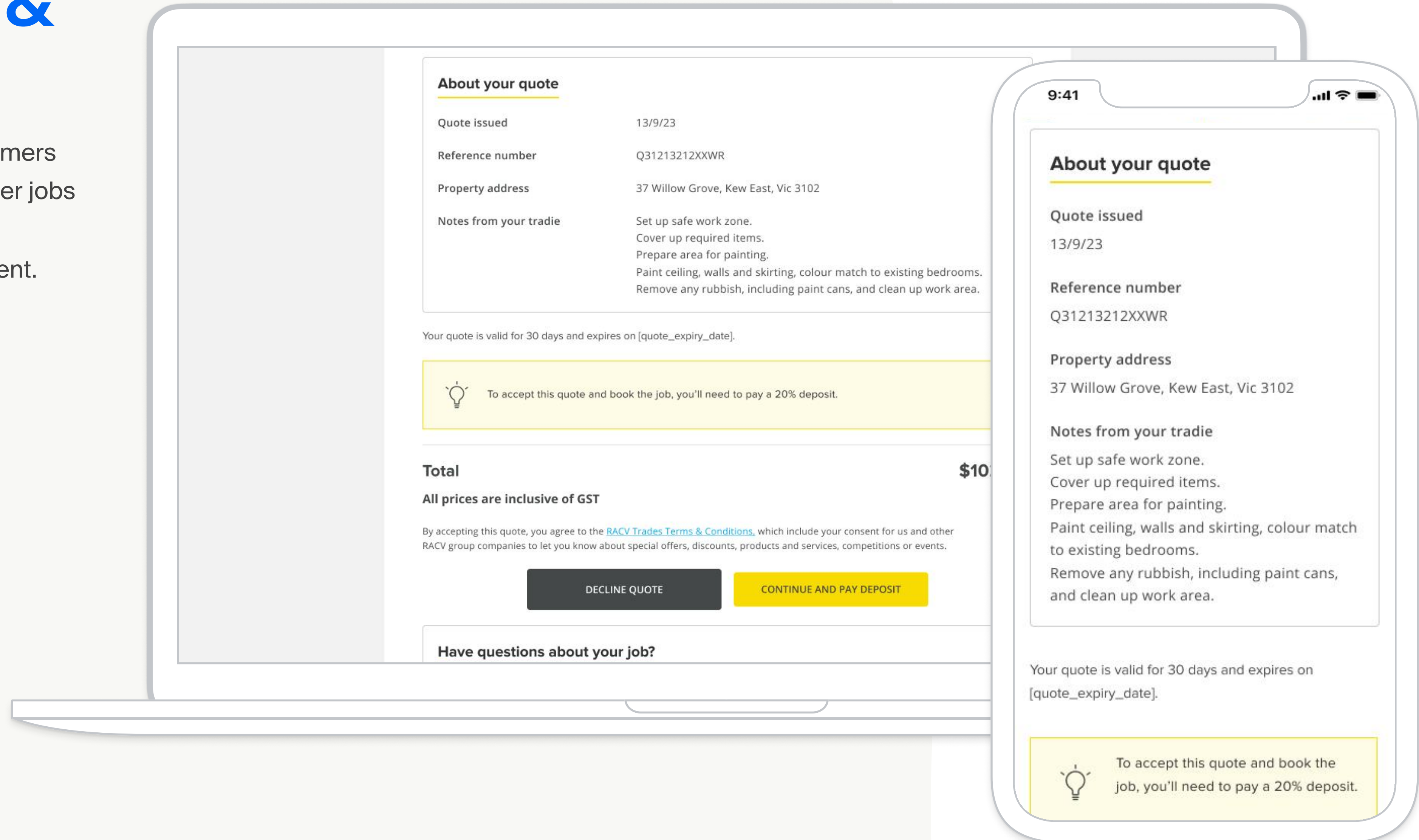
Fixed quotes

Our goal was to compare the performance and preference of how we present fixed quotes. We also wanted to understand if there's any conditions where one quote variant (fixed vs hourly) might be favoured over the other.



Fixed quotes & deposits

Our goal was to understand how customers perceive deposit requirements for larger jobs and evaluate the effectiveness of our messaging in conveying this requirement.



Theme & Insights

A collection of key themes captured

Submit a job

User expectations

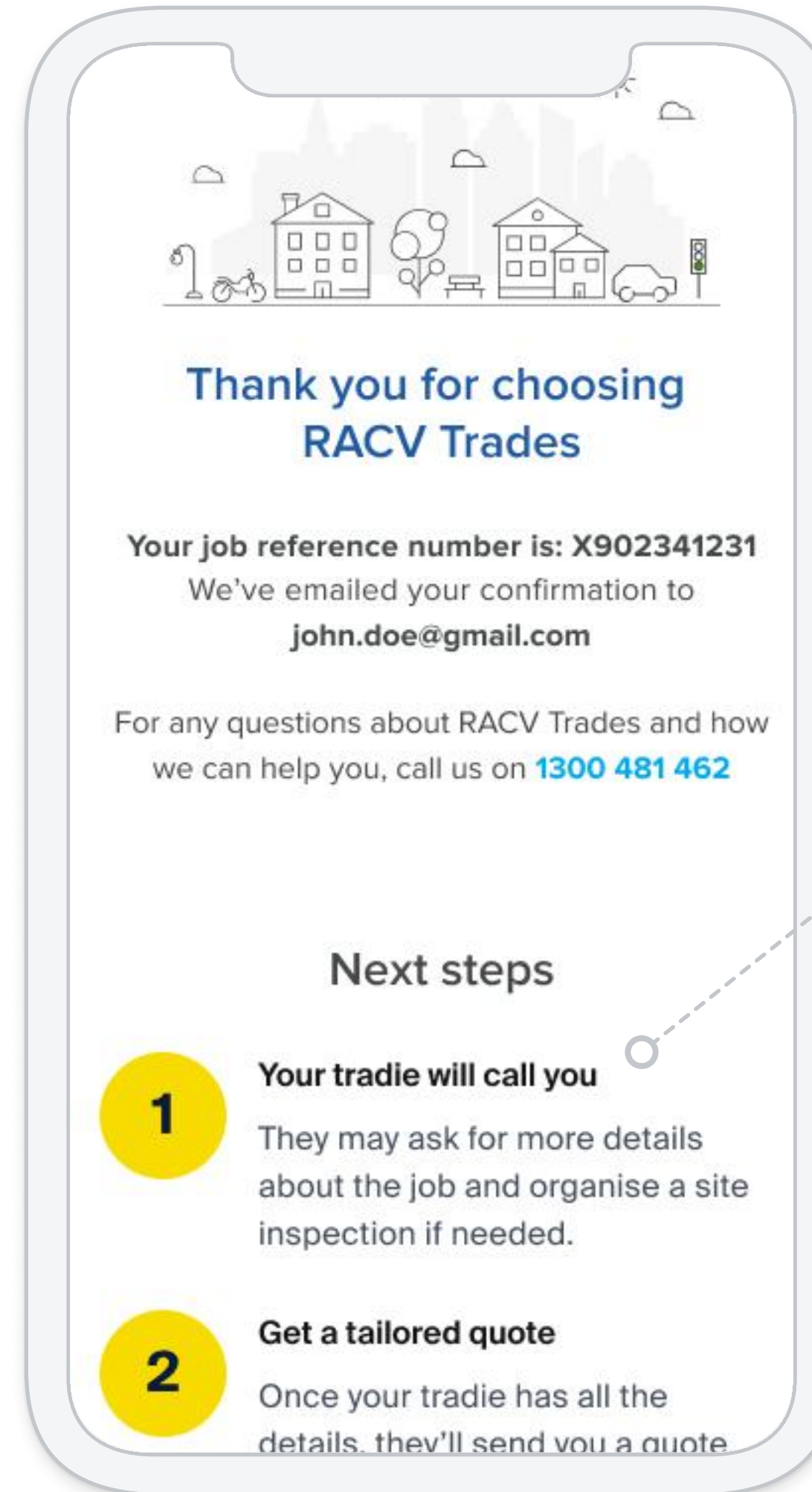
Users expected a contact timeline upon job submission, outlining when the tradie would initiate contact for inspection. Notably, 57% of participants held this expectation which emphasises its significance.

“There’s no time frame of when the tradie will call you. I anticipate it would be the next 48 hrs” – Participant 1

“Add a potential timeline when the trader will call, so if they don’t, the user can follow up” – Participant 2

“Timeline of when tradie will be in touch on confirmation page of job submission would be useful” – Participant 3

“Timeframe is the only thing that restricts me, certain days and times might not work for me” – Participant 6



▲ Areas for improvement

No timeline is available indicating when the tradie will initiate contact.

Recommendation

Revise this page to include concise information that establishes a clear timeline for when the tradie will initiate contact. This can be embedded in step 1. This will help manage user expectations effectively.

Submit a job

Heritage overlay understanding

While the majority of users comprehended the reference to a heritage overlay on the property, only one participant raised questions about its relevance earlier in the job submission flow

“Make sense to me but not everyone would identify” – Participant 1

“Better to see the question at the later stage” – Participant 4

“Liked that there is an unsure option for the heritage question, also found having this question good to have at this point.” – Participant 5

“I think it's relevant because we are changing the house, something might need approval which people don't know about” – Participant 5

How many rooms or areas need to work? *

1 to 2

3 to 4

5 or more

Do you know if any property restrictions apply that would need council approval? E.g heritage overlay * ?

Yes

No

Unsure if required

What is your relationship to the property? *

I own and live in the property

I own the property and rent it out

✓ Positive feedback

57% of participants had a positive response to the relevance of the question and its clarity.

One participant appreciated the inclusion of an 'unsure' option, which they felt accommodates users less familiar with the concept of heritage overlay.

Submit a job

Acceptance of 25 character limit

Users resonated with the 25-character limit, with several participants finding it fair and easy to meet. Impressively, over 70% of users expressed agreement with this limit.

“Perhaps fair, it's not going to take a lot of time out of people's lives” – Participant 1

“25 character limit is fine – you're barely typing anything ... so easy to get 25 characters” – Participant 2

“25 characters min – I think 25 is fine, I'd be happy with that” – Participant 3

“Min 25 is fine, can't be too brief” – Participant 6

✔ Positive feedback

The reduction in character limit received unanimous approval from users. Additionally, users appreciated that the hint text provided guidance on what and how to write.

The screenshot shows the 'Your RACV Trades Job' app interface. The title is 'Your RACV Trades Job' with a progress indicator showing the second step is active. Below the title is the section 'Details of the job'. A 'Required fields *' label is present. The main input field is titled 'Briefly describe the job you need done * ?' and contains the text: 'E.g. Install large pendant light above stairwell to existing ceiling fitting'. Below the input field, it says 'Minimum 25 characters' and '0/500'. Below this is the question 'Do you have any relevant photos? (optional)'. At the bottom, there is an 'Upload photos (maximum 5)' button with an upload icon and a note: 'Photos need to be under 10MB in .jpg, .jpeg or .png format'.

The screenshot shows the same 'Your RACV Trades Job' app interface. The title is 'Your RACV Trades Job' with a progress indicator showing the second step is active. Below the title is the section 'Details of the job'. A 'Required fields *' label is present. The main input field is titled 'Briefly describe the job you need done * ?' and contains the text: 'Apply a fresh coat of paint to 3 bedroom ceilings, ensuring even coverage for a renewed and vibrant look.' Below the input field, it says 'Minimum 25 characters' and '102/500'. Below this is the question 'Do you have any relevant photos? (optional)'. At the bottom, there is an 'Upload photos (maximum 5)' button with an upload icon and a note: 'Photos need to be under 10MB in .jpg, .jpeg or .png format'.

Submit a job

Photo uploading messaging

While not essential for all jobs, customers resonated with the photo uploading messaging and appreciated its optional nature. Most participants found the messaging to be adequate, offering sufficient information.

However, participants also felt that the decision to upload a photo depended on the specific requirements of the job.

“Useful to have photo upload as it benefits the tradie more so” - Participant 2

“I do like that it's optional, so you're not having to take a photo in order to proceed through” - Participant 3

“Photo requirement gives enough information on importance” - Participant 6

“Photos - I would use it because times where I used hipages and didn't put photos the tradie always asks for photos” - Participant 7

Briefly describe the job you need done * ?

E.g. Install large pendant light above stairwell to existing ceiling fitting

Minimum 25 characters 0/500

Do you have any relevant photos? (optional) ○

Upload photos (maximum 5) |

Photos need to be under 10MB in .jpg, .jpeg or .png format

PREVIOUS **CONTINUE**

Need help?

Frequently asked questions

Call RACV Trades on 1300 481 462

Insight

85% of participants indicated that taking a photo was primarily for aesthetic or cosmetic purposes, directly relevant to the item they were requesting a quote for.

Some participants noted that they wouldn't take a photo of issues like a blocked drain or power socket installation, but would choose to capture images of visible damages or items in need of repair.

Hourly quotes

Value prop adds value

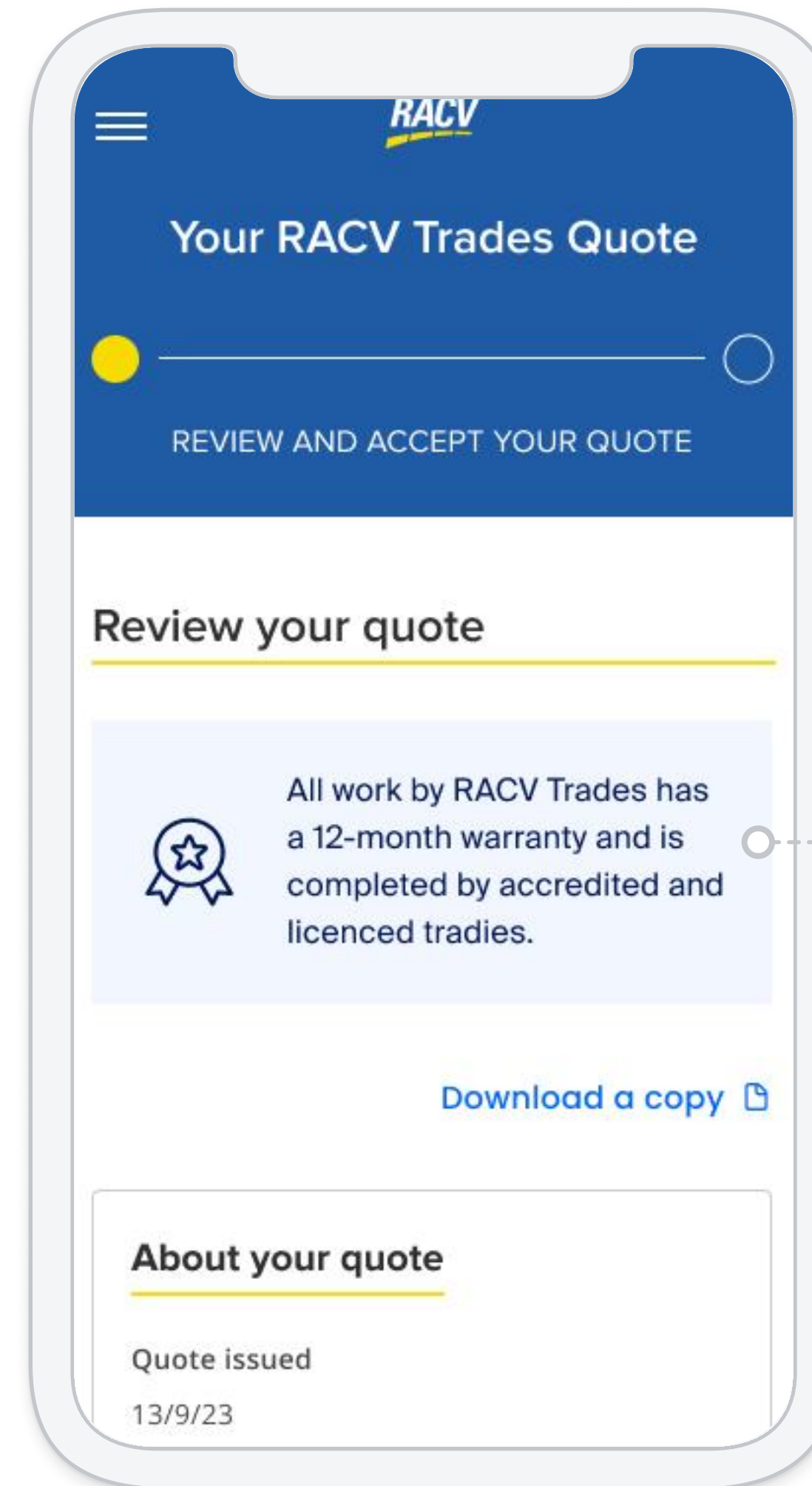
86% of our participants acknowledged the value in our proposition, confirming that the component instils a sense of security and enhances credibility. Additionally, it's important to highlight that the 12-month warranty received positive feedback. Participant 4 stated, ***“it incentivises me to complete the quote.”***

“Value prop is great to have - 12 month warranty. If something happens we can contact RACV ... blue value prop - quite noticeable and good to have at the top” - Participant 2

“I think the value prop adds value, I'll just leave it there ... if you already trust RACV as a name people will choose to use them for their rep” - Participant 3

“I think it's important to have it there specially at this time where dishonesty is everywhere” - Participant 5

“Value prop gives value and adds credibility - I'm in good hands as they're from RACV” - Participant 6



✔ Positive feedback

Located prominently at top of the quote flow, the value proposition component adds significant value, resonating with an overwhelming majority of participants.

Hourly quotes

Clarity on hourly terms

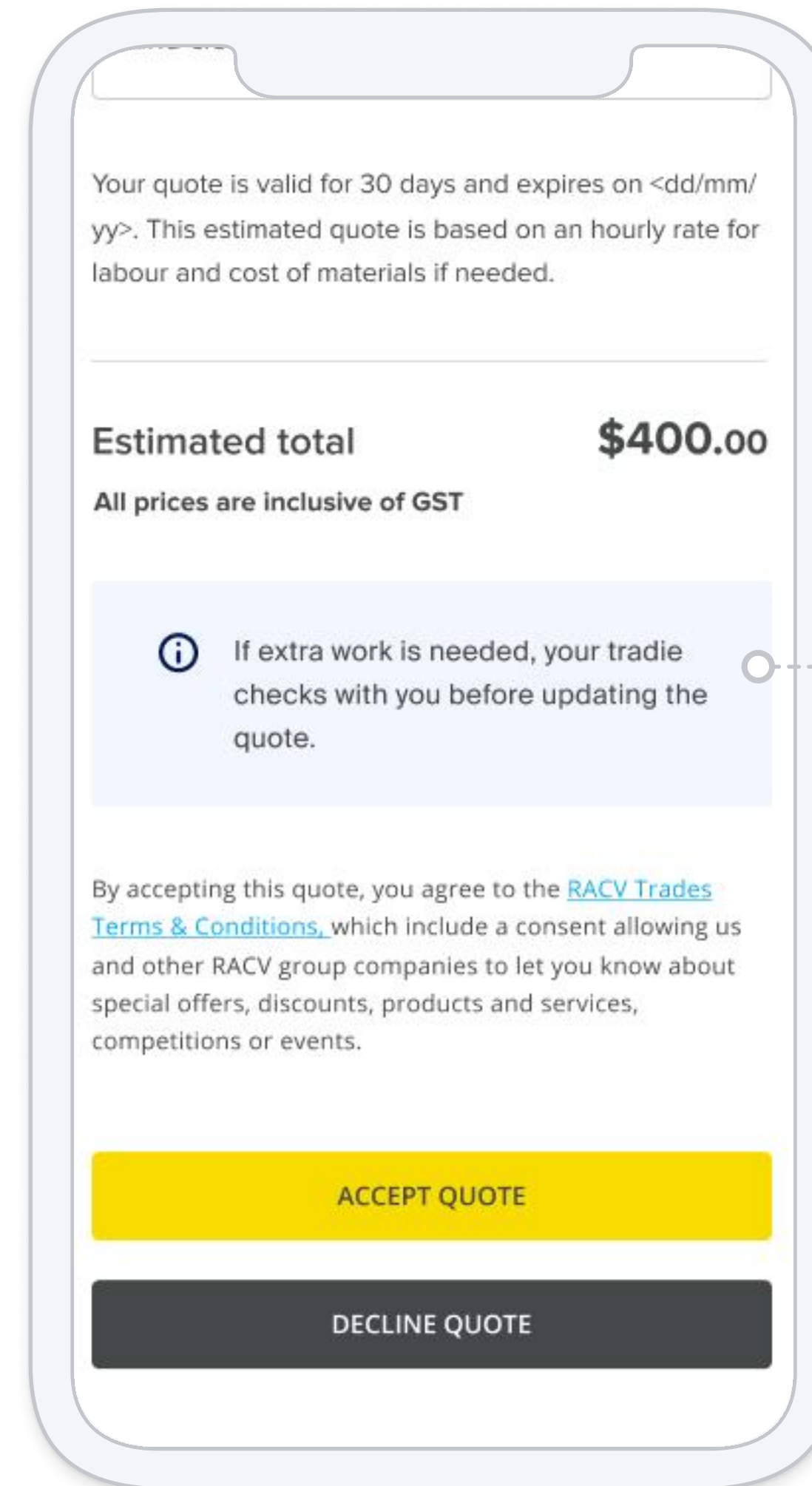
86% of participants expressed a desire for additional information concerning hourly quote terms, particularly regarding situations where tasks are completed more quickly than initially estimated.

“Add explanation on how much would customer be charged for over hour (eg. 3 hours 20 min)” – Participant 2

“There’s only information when more work is needed but doesn’t say what happens when it’s less” – Participant 4

“Estimated amount isn’t good enough ... show maximum amount as to how much I’ll be charged ... some people need a proper figure rather than estimates” – Participant 6

“I would like info on how the total is calculated when the work is done” – Participant 7



▲ Areas for improvement

While participants appreciated the logic behind displaying the hourly rate, they expressed a need for clarity regarding the scenario of an over quoted job.

For instance, if a job is quoted for 3 hours but gets completed in 2.5 hours, will a refund for the surplus 30 minutes be issued?

Recommendation

Update the blue panel copy to incorporate details regarding how surplus funds are managed in cases where jobs are over quoted.

Hourly quotes

Concerns about job duration

43% of participants expressed concerns about tradies potentially extending the job duration to charge more. They cited a lack of confidence in tradies not unnecessarily prolonging the duration as the underlying issue.

“If the price is fixed the tradie might do the work faster, meanwhile when it’s hourly they might take their time to earn more” – Participant 2

“I would prefer a fixed quote, I would worry if the tradie purposely take more time” – Participant 5

“Fixed would give me more control over hourly, who knows how long hourly would take” – Participant 6

Clarity and predictability

Users consistently preferred precise cost estimates over general hourly pricing. The consensus was that they value the clarity provided by fixed pricing, which enables a better understanding of their expenses.

As a result, many participants contemplated a fixed quote option as a means to enhance control over their service costs.

“Prefers fixed amount, would be less happy if it’s estimated amount and ends up being more” – Participant 3

“I don’t think I love the hourly rate, I understand it, it’s price transparency having hourly rate there” – Participant 4

“If I just get hourly rate it’s not enough info” – Participant 5

“Estimated amount isn’t good enough ... some people need a proper figure rather than estimates” – Participant 6

Hourly quotes

Context matters in hourly quote preferences

Hourly rate preferences varied among our participants, indicating that a one size fits all approach may not be suitable. They vary significantly depending on the context, including factors such as job size, urgency, and time frame. Understanding these nuances is crucial for tailoring our service offerings to meet diverse customer needs.

“Not sure if the hourly rate is suitable more for one type of trade than for the other. Maybe depends on the size of the job.” – Participant 2

“Would expect to pay hourly for cleaning, but otherwise would want to have a fixed price as the tradie should be able to estimate time and price.” – Participant 5

“Smaller jobs would be okay for hourly over quotes ... things that I know can be done in a specific time is what I'll prefer hourly quotes for” – Participant 6

“Emergency situation would prefer hourly price” – Participant 7



🕒 Insight

Our study highlights a strong preference for hourly quotes, particularly in contexts that include smaller jobs and tasks with specific timeframes.

Fixed quotes

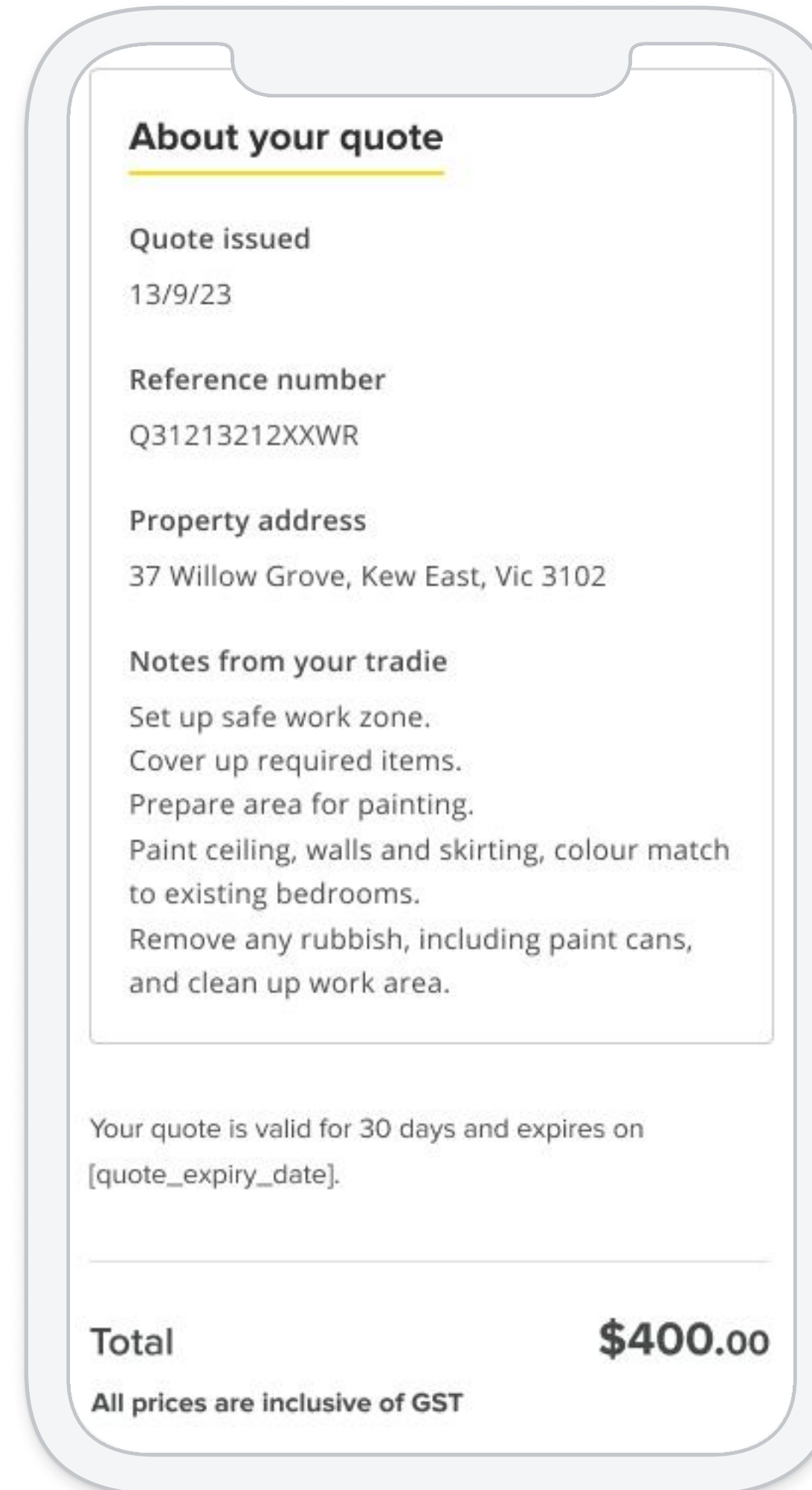
Clarity on job requirements and duration

Users expressed a preference for a detailed breakdown of job requirements and a clear timeframe for the job's duration. Over 70% of participants felt that this approach significantly enhances clarity and instils confidence in users.

“I like knowing how the price is broken down ... feels like I’m just getting an amount I don’t know what it’s made out of ... it will be good to have a time frame on how long the job will take (duration of the job)” – Participant 1

“Would be good to add timeframe so I know how long to be at my house for ... If I’m taking a day off, need to know how long to take off as well, so add hour estimate would be good” – Participant 2

Would want to have a note that if the tradie would need to do some adjustment that might increase the price the participant will be notified about it in advance ... mention the time to take to complete the job and if it requires more work. – Participant 5



⚠ Areas for improvement

Participants overwhelmingly express that a detailed job breakdown and a clear timeframe embedded within the quote are missing and needed.

Recommendation

Introduce an additional heading below 'property address' to offer a concise breakdown of the job's requirements and its completion timeframe. This enhancement is expected to boost user confidence.

Fixed quotes

Optimising tradie notes

While only a small percentage, a couple of participants expressed a desire for better utilisation of 'Notes from your tradie' to include details about materials sourced or replaced with tradie's contact details, especially in cases where customers need to follow up.

"Perhaps to include source materials under notes from tradie" - Participant 4

"Wouldn't expect to see all these notes from the Tradie ... expect to have the tradie's details available rather than notes from a tradie" - Participant 7

Reference number
Q31213212XXWR

Property address
37 Willow Grove, Kew East, Vic 3102

Notes from your tradie

- Set up safe work zone.
- Cover up required items.
- Prepare area for painting.
- Paint ceiling, walls and skirting, colour match to existing bedrooms.
- Remove any rubbish, including paint cans, and clean up work area.

Your quote is valid for 30 days and expires on [quote_expiry_date].

Total **\$400.00**

All prices are inclusive of GST

By accepting this quote, you agree to the [RACV Trades Terms & Conditions](#), which include a consent allowing us and other RACV group companies to let you know about special offers, discounts, products and services, competitions or events

▲ Opportunity for enhancement

While the 'Notes from your tradie' section allows tradies discretion in their input, it could benefit from a standardised template to guide tradies in populating this field.

Recommendation

Workshop with Products to determine best utilisation of this real estate that also provides tradie contact details and the potential inclusion of sourced materials, where appropriate.

Fixed quotes

Preference for fixed pricing

For our user group, setting expectations from the onset and budgeting are top priorities. A significant 71% of our participants prefer fixed quotes over hourly rates.

“I like it being fixed, so if it goes over, it's on them so don't have to worry about the tradie taking their time” – Participant 2

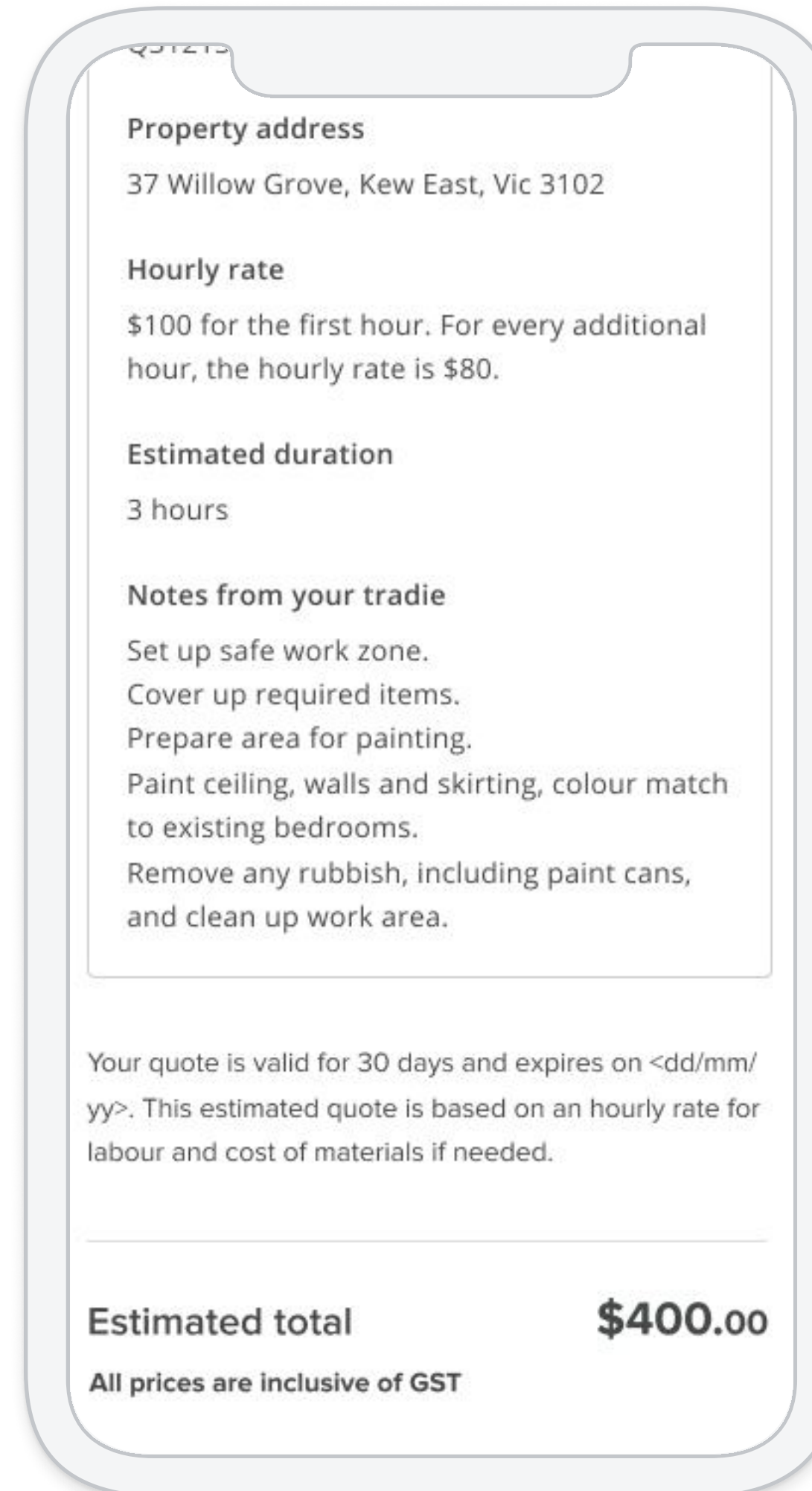
“Prefers fixed amount, would be less happy if it's estimated amount and ends up being more” – Participant 3

“Fixed might be a bit better as I know the price ... the fix quote helps me to budget” – Participant 4

Prefers to have fixed price to not have any surprises on the spot – Participant 5

“Fixed is better – helps with budget spending, how much I can put aside for” – Participant 6

71% of participants preferred **fixed quotes**



Q31213

Property address
37 Willow Grove, Kew East, Vic 3102

Hourly rate
\$100 for the first hour. For every additional hour, the hourly rate is \$80.

Estimated duration
3 hours

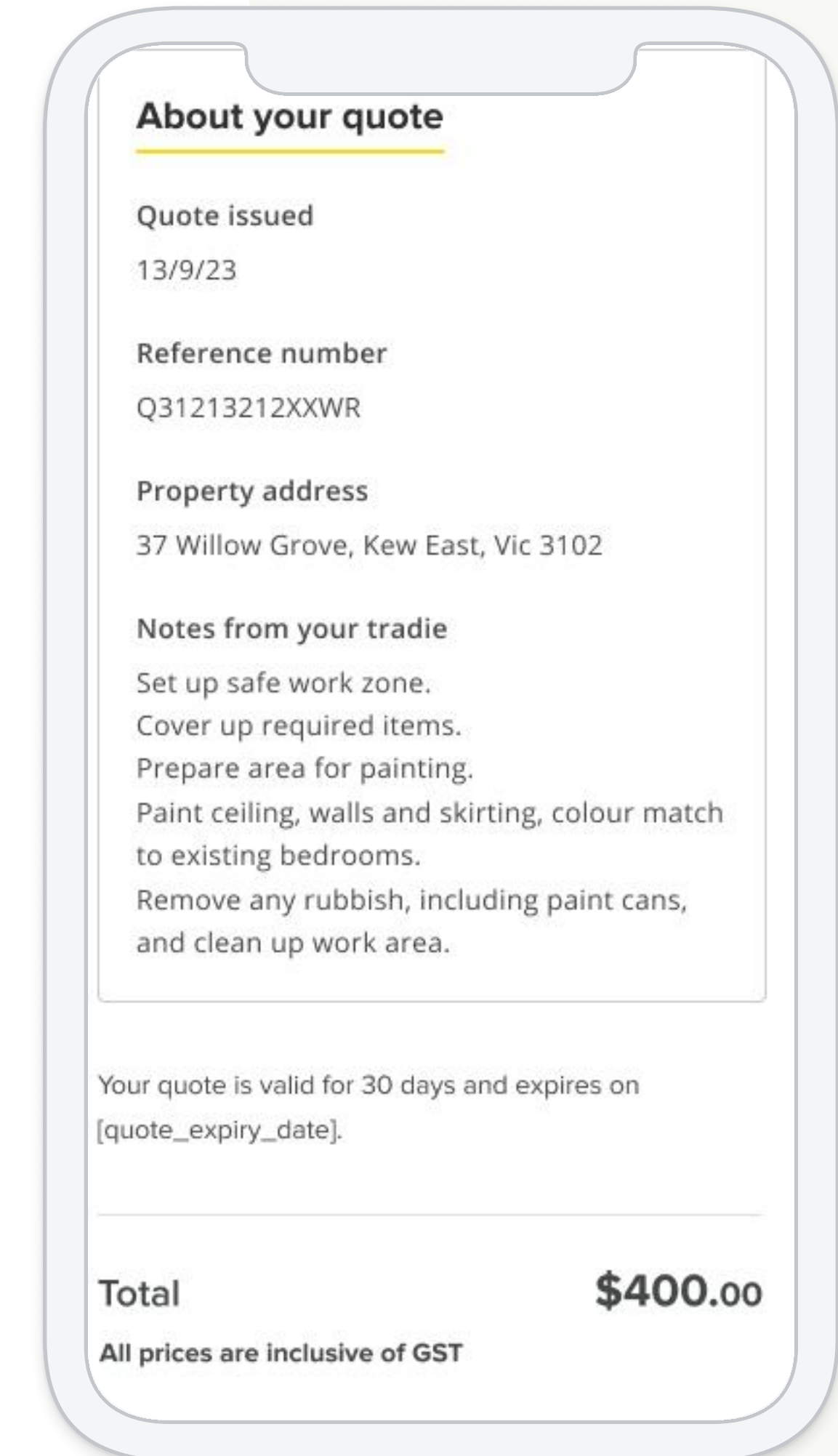
Notes from your tradie
Set up safe work zone.
Cover up required items.
Prepare area for painting.
Paint ceiling, walls and skirting, colour match to existing bedrooms.
Remove any rubbish, including paint cans, and clean up work area.

Your quote is valid for 30 days and expires on <dd/mm/yy>. This estimated quote is based on an hourly rate for labour and cost of materials if needed.

Estimated total **\$400.00**

All prices are inclusive of GST

Hourly



About your quote

Quote issued
13/9/23

Reference number
Q31213212XXWR

Property address
37 Willow Grove, Kew East, Vic 3102

Notes from your tradie
Set up safe work zone.
Cover up required items.
Prepare area for painting.
Paint ceiling, walls and skirting, colour match to existing bedrooms.
Remove any rubbish, including paint cans, and clean up work area.

Your quote is valid for 30 days and expires on [quote_expiry_date].

Total **\$400.00**

All prices are inclusive of GST

Fixed

Fixed quotes & deposit

Deposit amount inclusion

All 71% of participants emphasised the importance of prominently displaying the 20% deposit amount. This clear presentation is crucial as not everyone can easily calculate it themselves. It also simplifies the user experience, eliminating the need for users to manually calculate fractional amounts.

“I understand 20% of deposit, but it doesn't tell me exactly how much” - Participant 1

“Should say the amount, if not a round number others much struggle to work out 20%” - Participant 2

Have the deposit amount, how much 20% is under the total - Participant 5

Would want to have a figure of the deposit not just the percentage, cause people don't want to count what the deposit amount would be - Participant 5

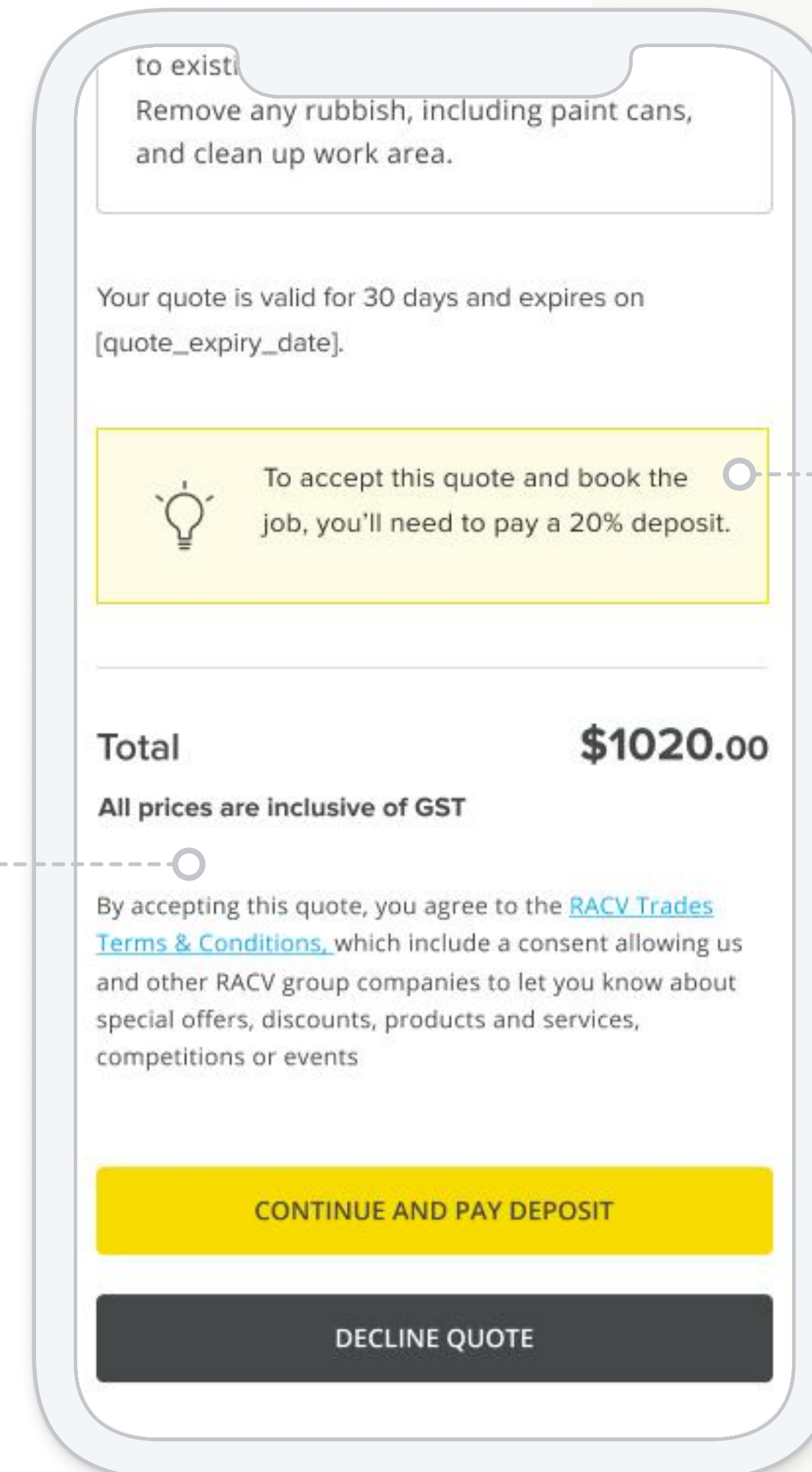
Need to work out how much 20% would be using my calculator - Participant 6

▲ Areas for improvement

Participants have suggested that the 20% deposit amount should be displayed directly beneath the total.

Recommendation

Rework this screen to surface the deposit amount under the total. This addition would eliminate any guesswork, resulting in a more user-friendly experience.



📌 Insight

Participant 3 mentioned that the lightbulb icon triggers alarm and evokes a negative connotation saying:

“lightbulb looks like an alarm, adds negative connotation rather than positive, alarming sort of message. Change lightbulb to something else and place 30 days under quote amount.”

- Participant 3

Recommendation

Potentially replace this component with the branded navy tool tip that doesn't have the lightbulb to provide more contrast.

Fixed quotes & deposit

Mindset and challenges with deposits

Over 70% of our participants felt that small jobs, particularly those amounting to less than \$500, shouldn't require a deposit. Among these participants, 43% expressed a strong inclination to decline a quote when a mandatory deposit is stipulated.

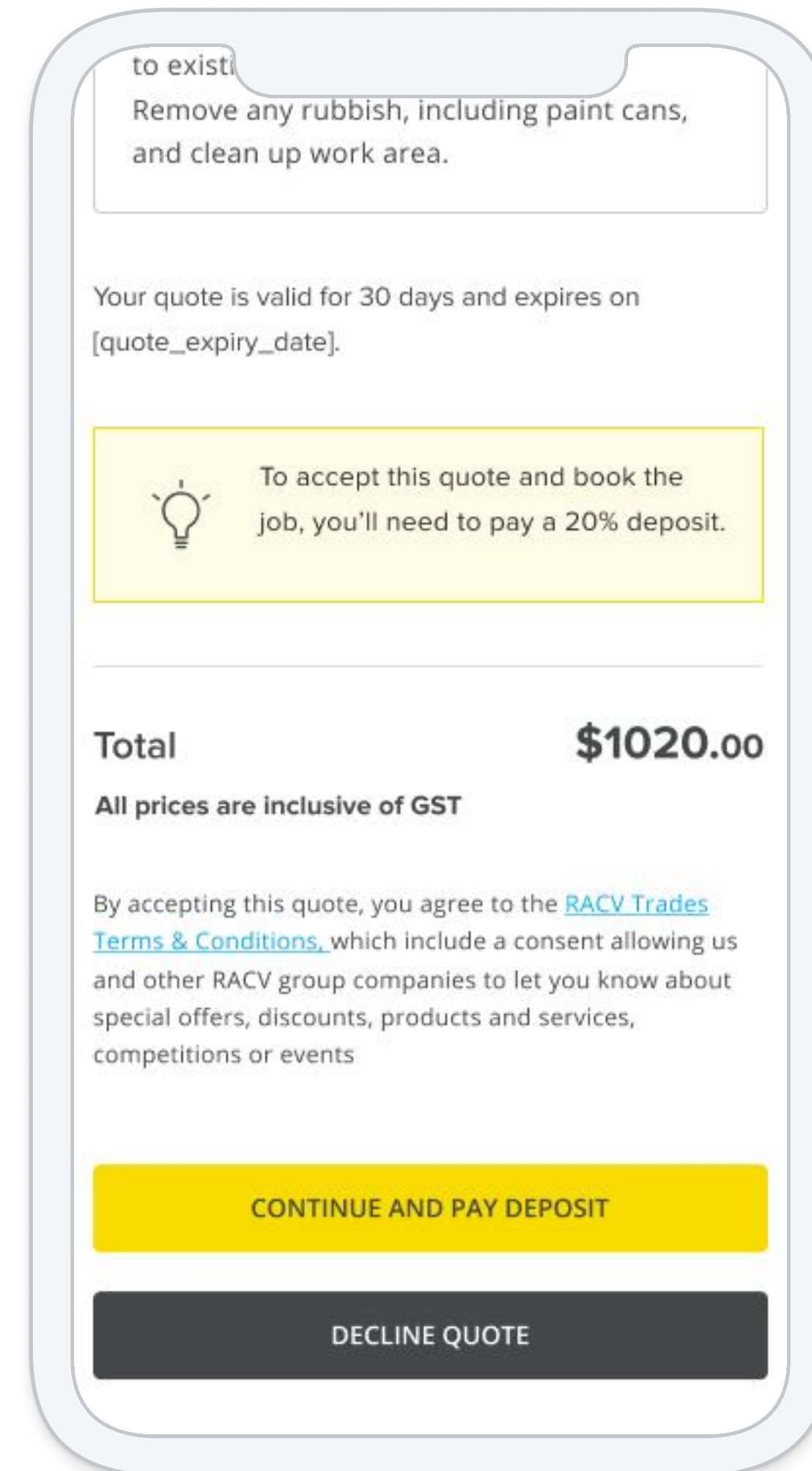
“\$500 or less I don't expect to pay a deposit for” – Participant 1

Over \$500 warrants a deposit, nothing less – Participant 2

For bigger jobs, it would be okay than smaller jobs – Participant 3

If the job is over \$600, a deposit is more justifiable, for cheap small job it's not necessary – Participant 5

“Landscape or concreting or big jobs is only when I expect to pay deposit ... not for small jobs, I wouldn't expect to pay a deposit” – Participant 7



Insight

Nearly half of our user group showed a clear aversion to paying a deposit. Participant 7 pointed out that other tradies don't enforce such a requirement.

“If I had to pay a deposit I would decline ... don't like the deposit requirement at all, no other trades people do that”

- Participant 7

Recommendation

There is no avoiding this, however there is an opportunity to uplift this page by highlighting some potential benefits of making a deposit. One could include service guarantee and other incentives.

Fixed quotes & deposit

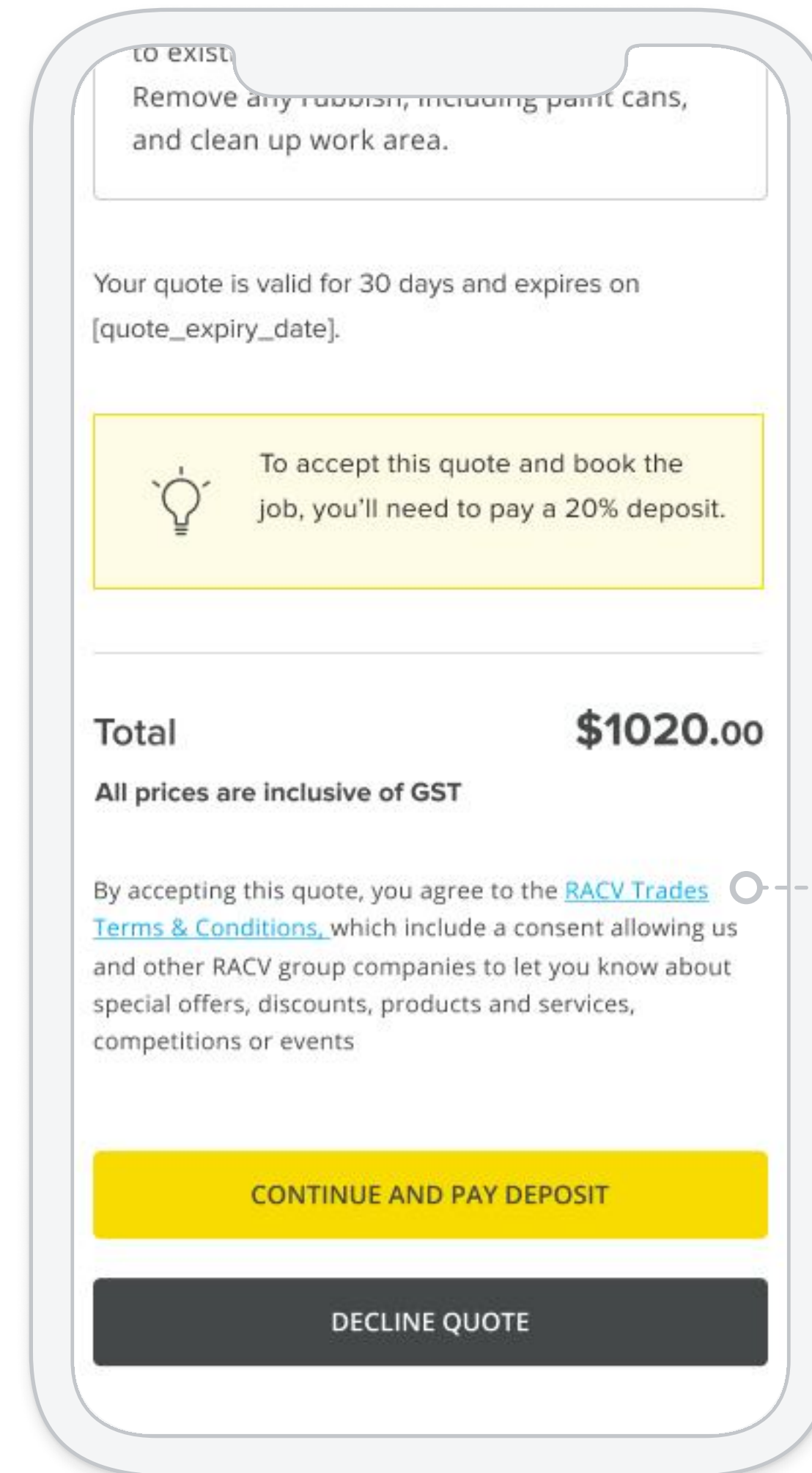
Enhancing deposit and cancellation policies

43% of users highlighted the need for clarity regarding deposit refunds and a well-defined cancellation policy, particularly in scenarios involving natural disasters and tradie no-shows. The uncertainty surrounding these situations has led to reservations about deposit requirements.

“Need to make sure if the deposit is refundable, cancellation policy” – Participant 5

Would I get the deposit back if there's flooding, bad weather, or fire, would I get that money back? – Participant 6

Some times tradies don't turn up, not happy with the deposit requirement at all, what would happen in that scenario? – Participant 7



▲ Areas for improvement

Recommendation
Incorporating the cancellation and refund policy into the terms and conditions clause could effectively address the concerns raised by participants.

Fixed quotes & deposit

Expectations and early communication

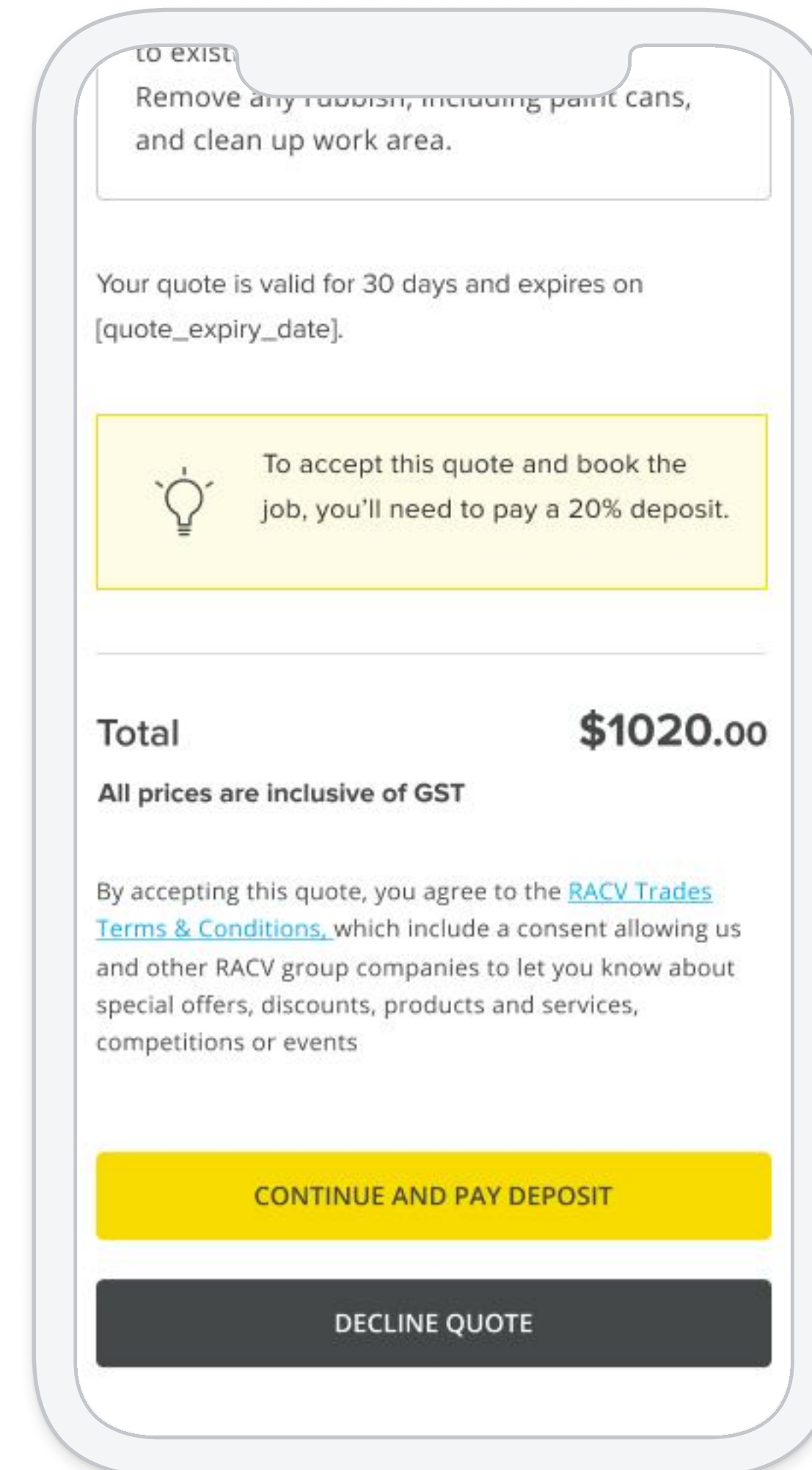
Participants anticipated a deposit amount to be set at 10% instead of 20%. It's crucial to note details about the 20% deposit early in the process to align with user expectations.

if I done the initial quote, it didn't mention anywhere about deposit which is frustrating - Participant 1

“Standard should be 10% for a deposit ... if it's a grand, wouldn't expect 20%, 10% is more reasonable” - Participant 2

Would expect the deposit to be 10% - Participant 5

Tell me early that the deposit is required, early on not at the deposit screen, ideally at the start - Participant 6



Insight

It's important to note that this sentiment was expressed by a portion of participants, constituting 28% of the sample size.

Quotes

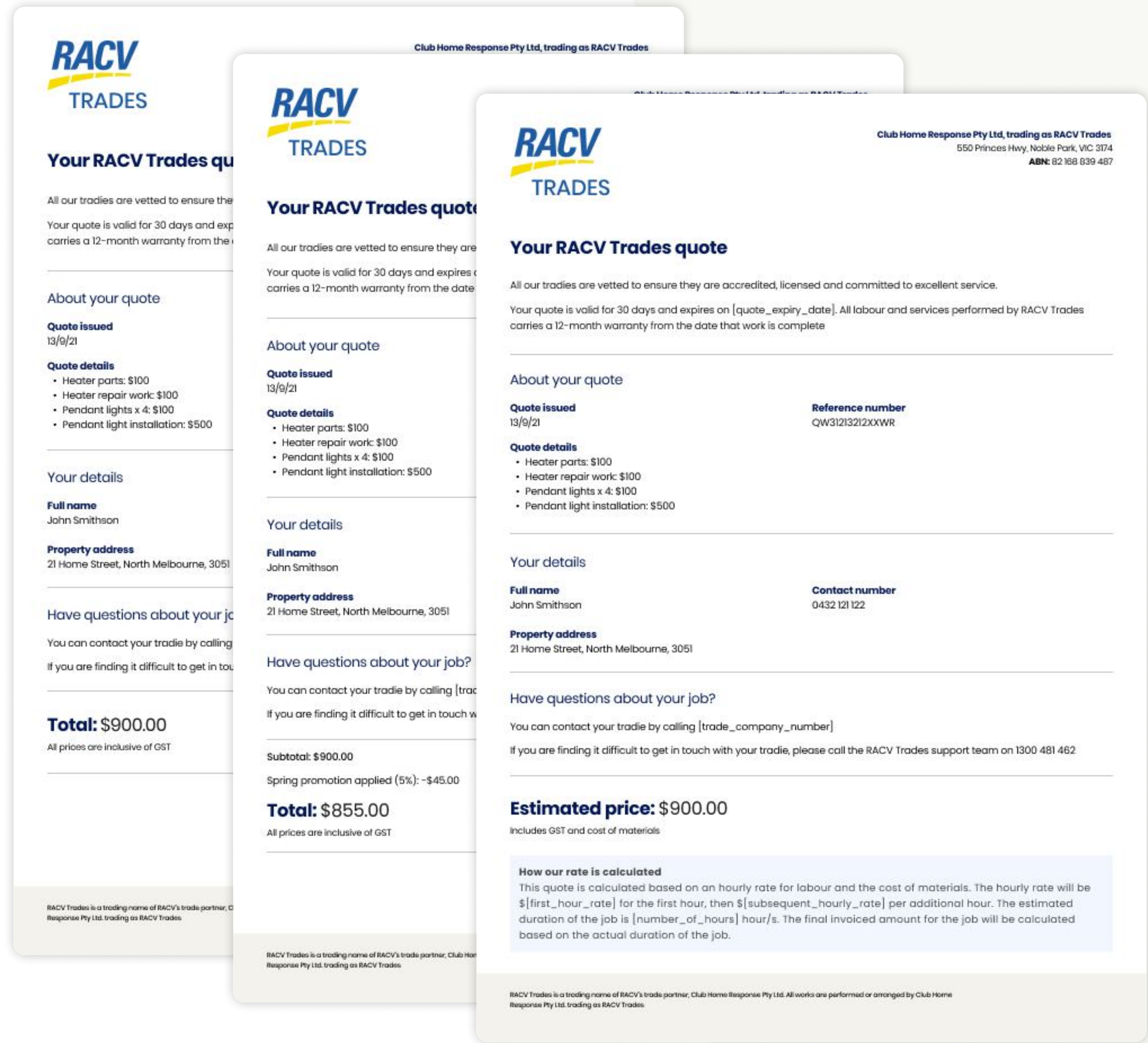
Preference for multiple quotes

At the end of each session, we asked users about their preference for receiving multiple quotes, and the sentiment was nearly unanimous. Users expected or preferred to receive multiple quotes, appreciating the approach taken by other platforms.

Having an option for multiple quotes if you are doing a large amount of work – would like this option as the start. – Participant 1

“... It's aligned with the industry when receiving more quotes, like airtasker ... we can compare certain quotes in the market” – Participant 4

If I could receive multiple quotes I'd be happy with that, as long as I can choose how to be contacted ... Not sure if Tradies have their own quoting system or if it's set by RACV but being able to get multiple quotes would be good – Participant 7



Recommendations

Iterative changes moving forward

Recommendations

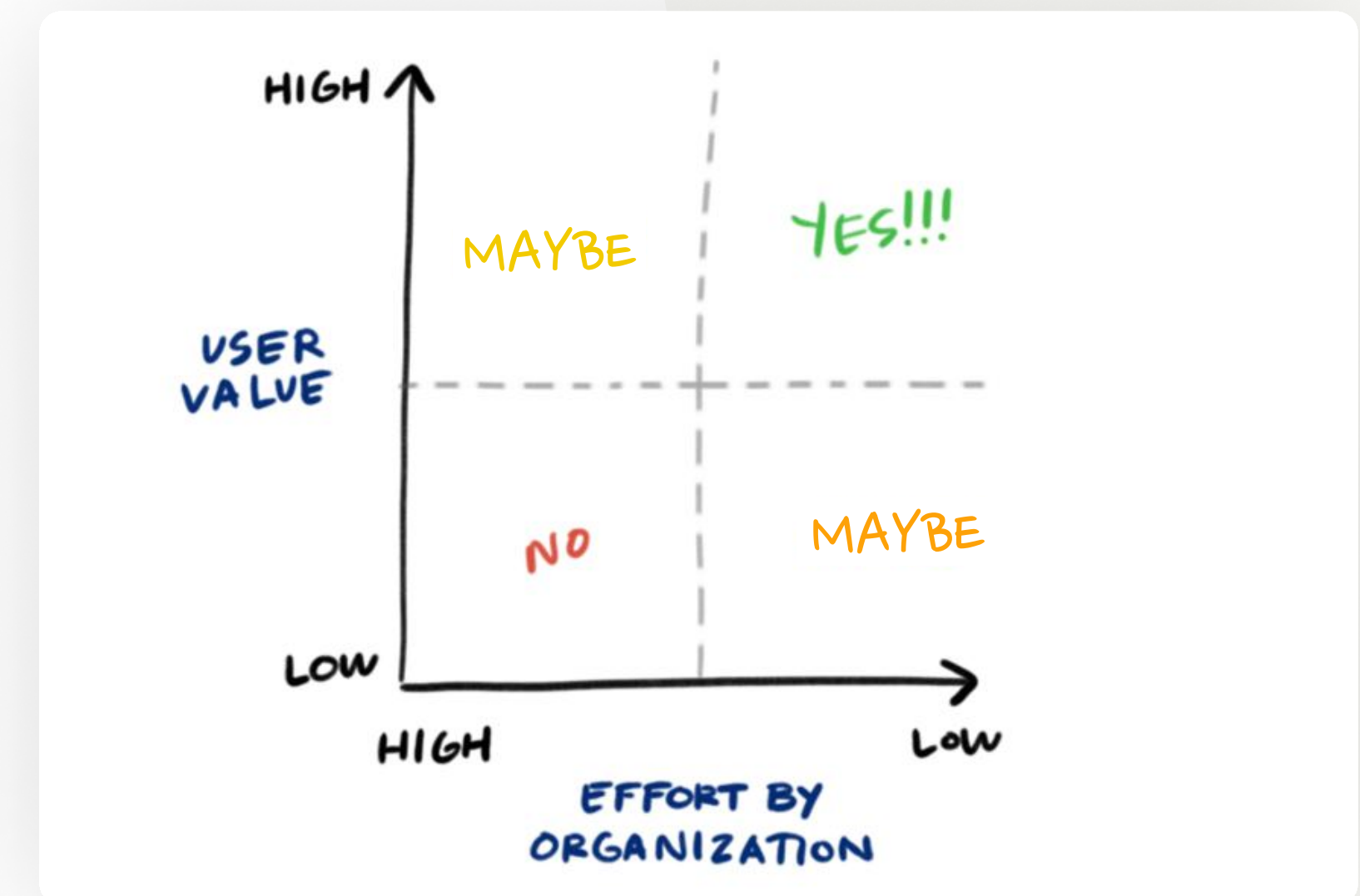
Submit a job

- A** Incorporate a clear contact timeline initiated by the tradie within Step 1 of the submission page [Slide 10].

Hourly quotes

- B** Integrate the value proposition component at the start of the hourly and fixed quotes, as our research confirms its significant value [Slide 14].
- C** Improve the blue panel text by providing details on how surplus funds are managed in cases of over-quoted jobs [Slide 15].
- D** Investigate possibilities for allowing users to select their preferred quote type, whether it's a fixed quote or an hourly quote [Slide 16 & 20].
- E** Incorporate the statement "Your quote is valid for 30 days and expires on [quote_expiry_date]" beneath the total amount for a more logical flow [DK recommendation]."

Prioritisation matrix



Recommendations

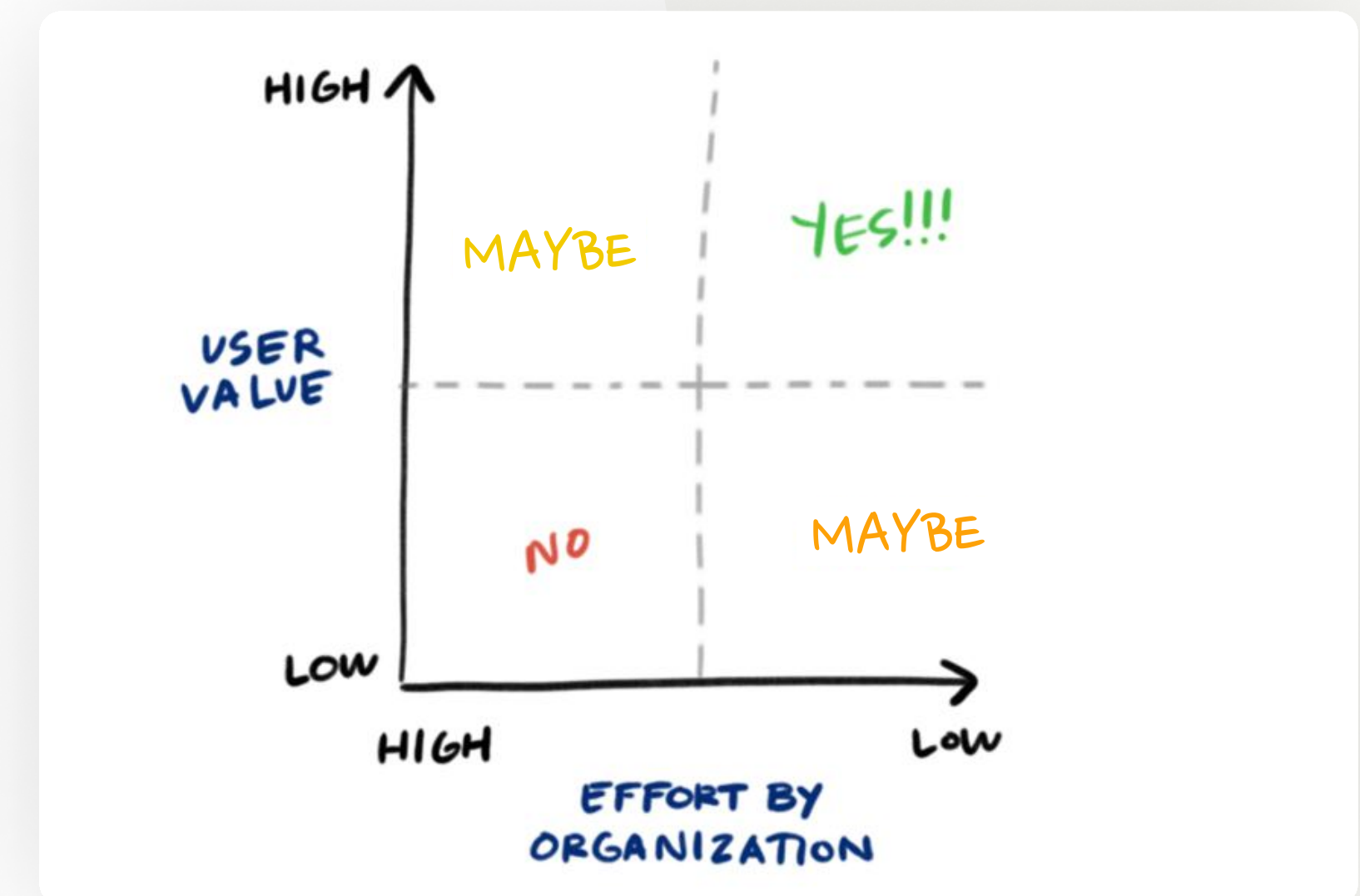
Fixed quotes

- F** Introduce a new section under “Property address” that provides a concise job breakdown and completion timeframe [slide 18]
- G** Work with Products to optimise the “Tradie’s notes” to potentially include tradie’s contact details and where applicable, material inclusion [slide 19]

Fixed quotes & deposit

- H** Incorporate the deposit amount under the total to eliminate any guess work and enhance user experience [slide 21]
- I** Explore the enhancement of the 20% deposit banner by replacing the yellow light bulb component with a branded navy tooltip to remove alarm and enhance contrast [slide 21]
- J** While it’s unavoidable, there is an opportunity to improve quotes that require a deposit by highlighting potential deposit benefits, which could include incentives [slide 22]
- K** Address participant concerns by integrating the cancellation and refund policy into the terms and conditions clause [Slide 23].

Prioritisation matrix

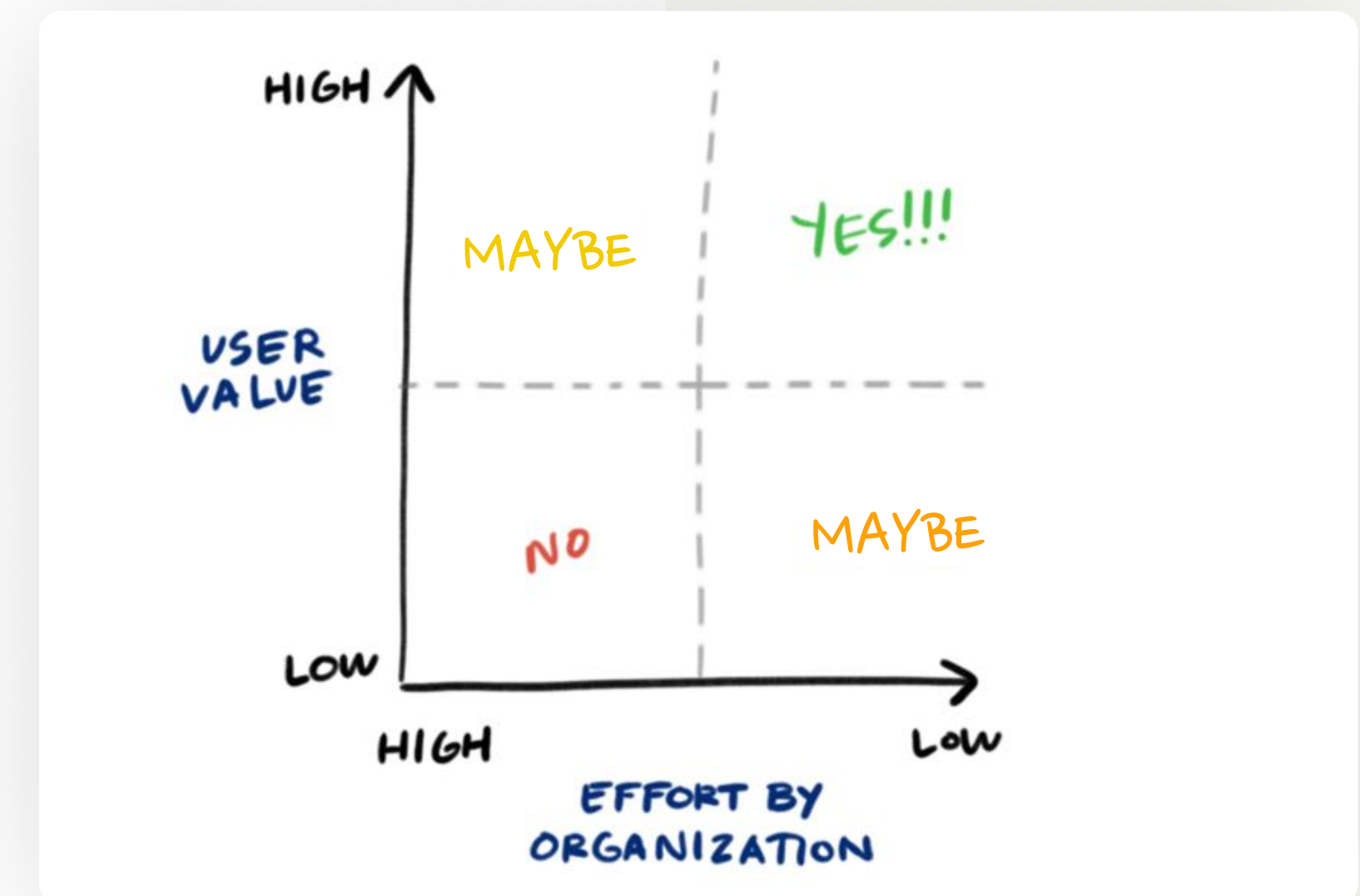


Recommendations

Other opportunities

- L** Consider the possibility of enabling users to receive quotes from multiple tradies, rather than just one, as it aligns with strong user sentiment. Many users expect or prefer having multiple quotes, drawn by the positive experience offered by other platforms [DK recommendation].
- M** Provide a pricing guide for more simpler tasks. This will streamline the quoting process, reduce the need for on-site inspections and filter out time-wasters [DK recommendation].
- N** Allow customers the ability to upload other file formats that includes PDFs, as users might want to submit floor plans and diagrams for more complex jobs. This enhancement will improve quote accuracy, shorten turnaround time for quote acceptance and reduce the need for extensive correspondence [DK recommendation].
- O** Implement video capabilities to allow tradies to conduct inspections remotely via video. This feature will expedite the quote delivery process [DK recommendation].

Prioritisation matrix





Thank you

Notes here in Miro

Date: October 2023

David Khuu