



# Connecting your app to the right customers

Karen Hartsell and Matthew Kanas

A photograph of two young women with long blonde hair talking outdoors at night. The woman on the left is in profile, wearing a dark jacket with a fur collar. The woman on the right is seen from the back, wearing a light-colored top. The background is dark with some blurred green foliage.

**Take a few moments  
to CONNECT with  
your neighbour**

# CPD Process

## In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

# Today's speakers



**Karen Hartsell**

Developer Partner Programs Leader,  
Intuit Developer Group

@khartsell



**Matthew Kanas**

Developer Partner Leader,  
Intuit Canada

@mckanas

# Agenda

1

It All Starts  
with the  
Customer

2

Behind the App  
Marketplace  
Curtain

3

Demystifying  
the Marketing  
Funnel

4

Q&A

**It All Starts with the Customer**



# How Intuit builds product



**Customer Obsession**

# Active customer obsession is...



## Savoring the surprise

Digging into the insight or result that makes no sense. Focusing on the outlier, the information that doesn't fit, to know the customer better than they know themselves



A woman with long, wavy red hair tied in a braid is seen from the side, focused on her work. She is sitting at a desk in what appears to be a boutique or a small business office. In front of her is a laptop displaying a website with various images and text. The background is filled with shelves and racks of clothing, including a white t-shirt with a graphic. The scene is lit with soft, natural light. There are green decorative shapes in the top left and bottom right corners of the image.

**Small Business owners are the ultimate utilitarians**

# A day in the life of a small business owner...

Small business owners are driven by the tasks they need to juggle everyday.



# A day in the life of a small business owner

Small business owners are driven by the tasks they need to juggle everyday.



# A day in the life of a small business owner

Small business owners are driven by the tasks they need to juggle everyday.



“

I worry about  
Payroll. I just  
want to stay  
out of trouble.

**Tasks are highly emotional**



“

If my calendar is full, then I know I'm not in the red.

**Workarounds are the workflow**

“

Eliminating  
complexity and  
noise makes for  
faster and easier  
decision making.

**Clarity drives action**

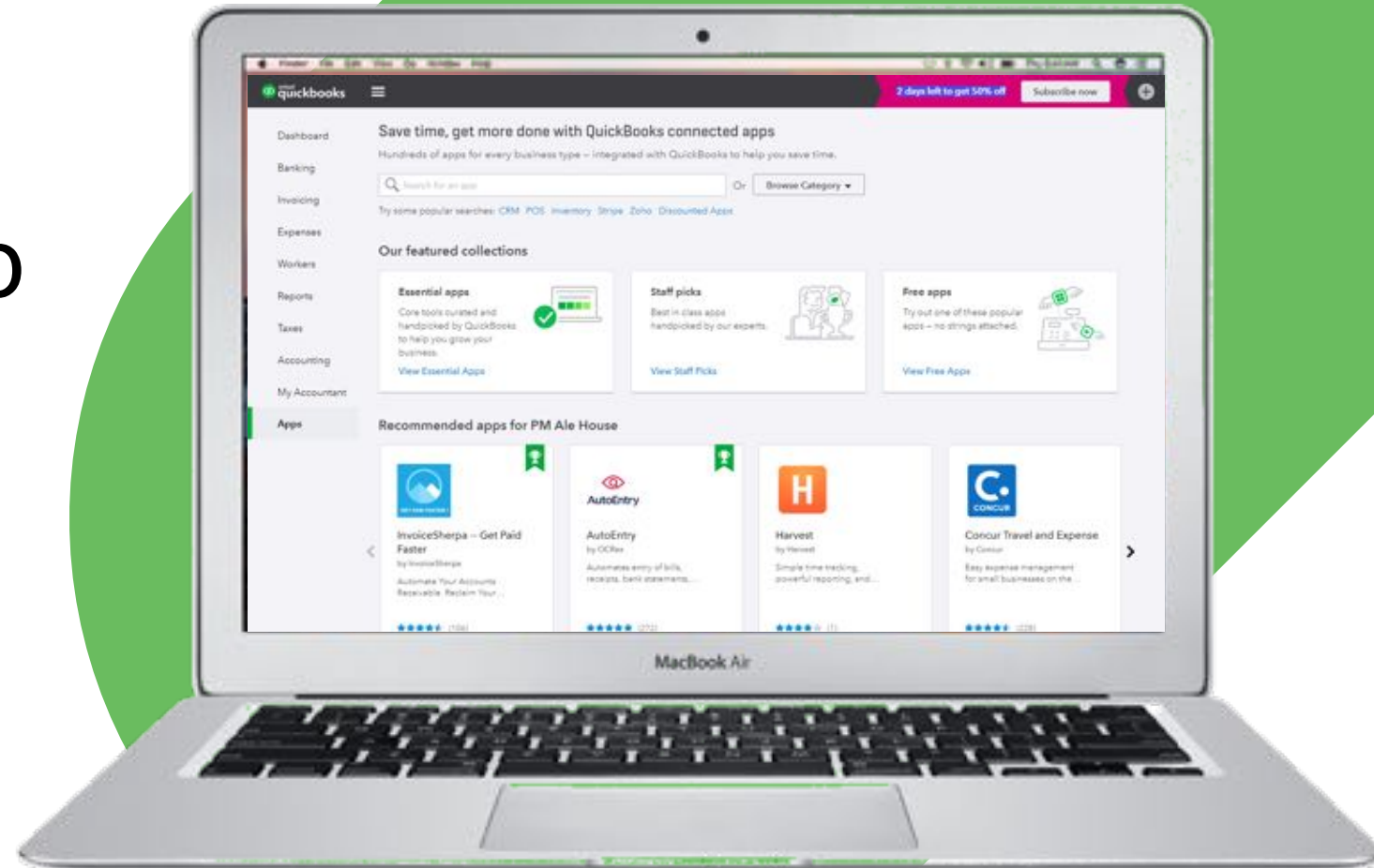


# Behind the App Marketplace Curtain





~70,000 users  
browse the apps tab  
looking for ways to  
save time and get  
more efficient.

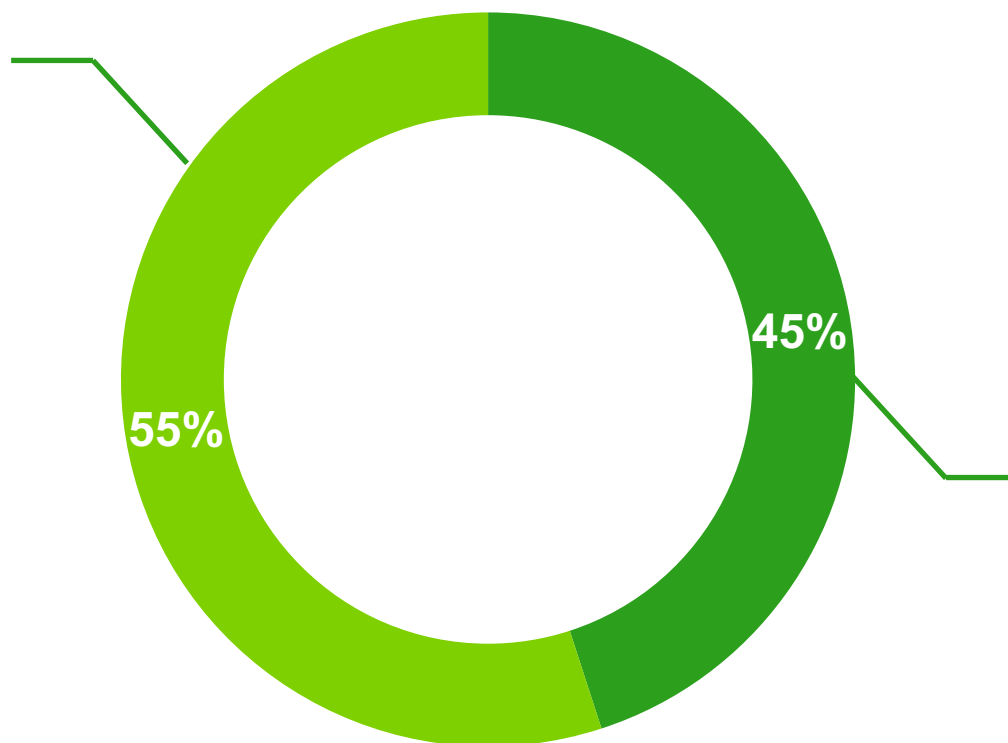


# Finding 'right for me' apps – Browsers vs. Seekers

Small business owners either browse for something of value or seek out something in specific

**Seekers** are looking to address a latent need. Often looking for something specific and exhibit high intent to buy

Aids: Search, Categories



**Browsers** need validation and/or need to see value. No compelling need but looking to be more efficient.

Aids: Collections, Recommendations

Source: App connection data, 2018.

# Among seekers, search is #1 aid to find and connect apps

To search is a consumer behavior default on the web – we see QBO users do the same

According to Forrester research:

**43%**

of site visitors today  
go immediately to  
search boxes



# Dissecting the customer's search vocabulary

Customer search vocabulary spans a very wide spectrum

Customers search for:



**Product/  
App Name**

Square (12,305),  
PayPal (11,290),  
Stripe (5,871),  
Shopify (4,835)



**Job(s)**

Inventory (3,395),  
CRM (3,009),  
Payroll (2,772),  
POS (2,426)



**Tasks**

Import (1,323),  
Invoice (963),  
Budget (825),  
Fund (1,761),  
Scheduling (696)



**Features**

Geotagging  
employees,  
Multi-location time  
tracking, OCR,  
Assembly inventory



**Industry**

Church  
membership,  
Law firm billing  
app, Consulting  
time tracking



**Miscellaneous**

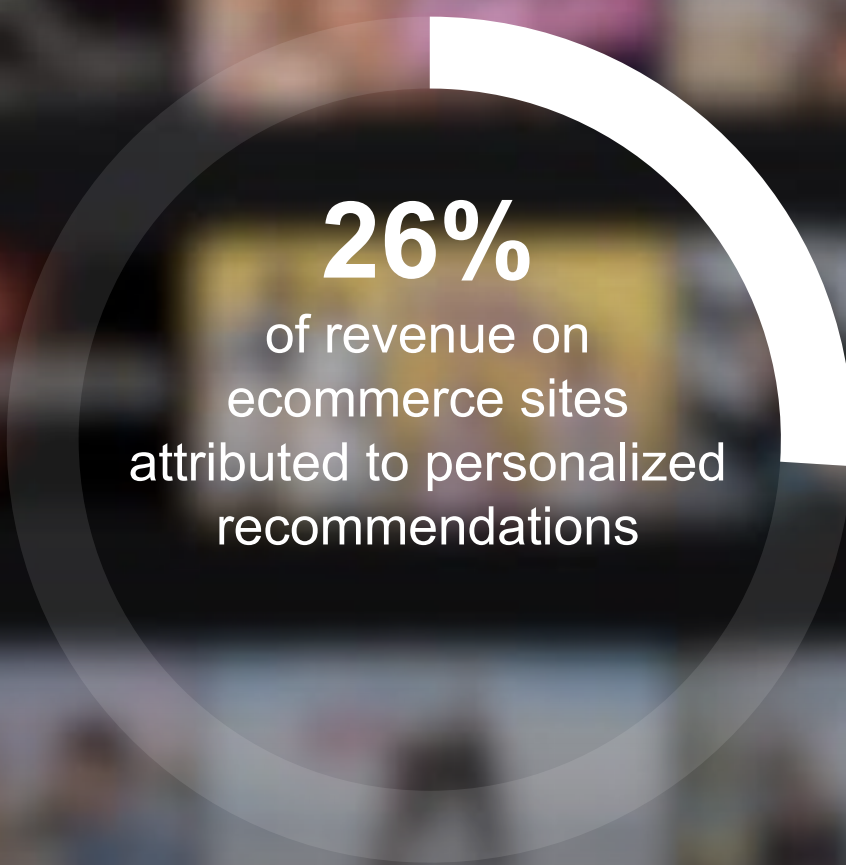
E-Signatures for  
sales forms,  
Shipping labels,  
Scanned  
attachments

Numbers in brackets refer to unique searches since March 2018.

# Among browsers, trusted recommendations are important

A lot of times, people don't know what they want until you show it to them. – Steve Jobs.

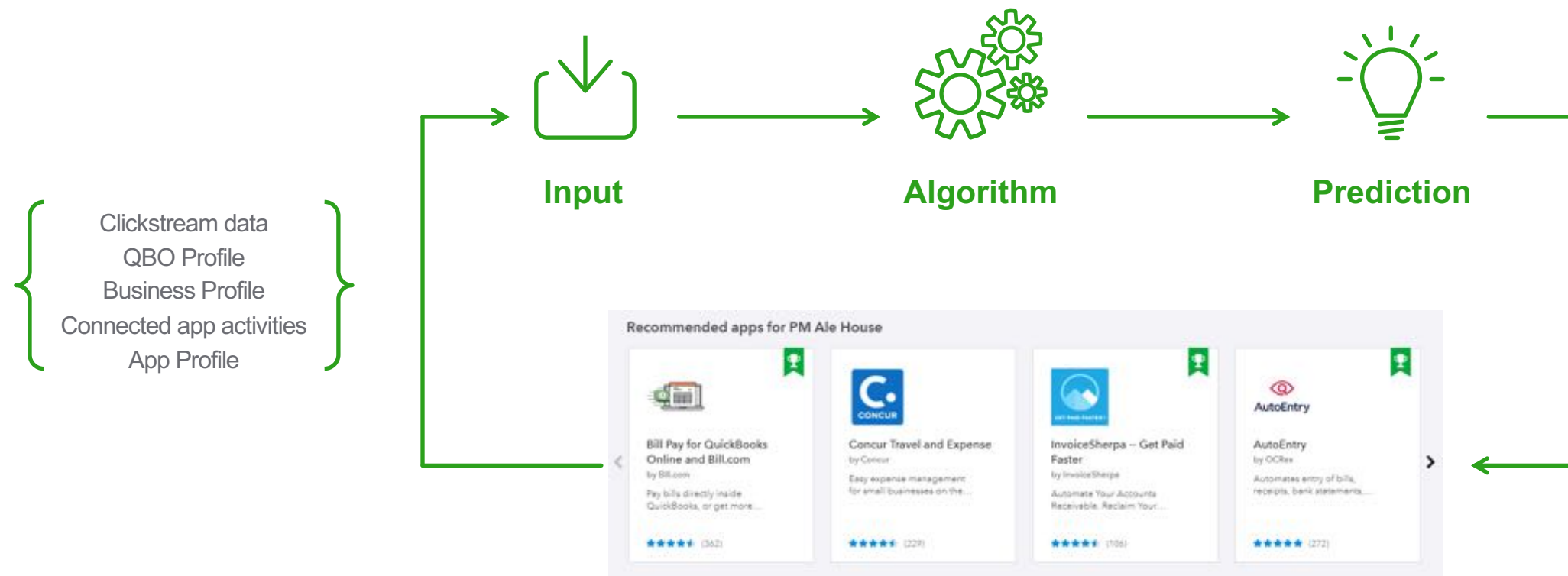
Salesforce study:



**26%**  
of revenue on  
ecommerce sites  
attributed to personalized  
recommendations

# The science behind surfacing 'right for me' recommendations

Matching latent customer need to quality apps is at the heart of recommended apps





# Demystifying the Marketing Funnel







Sales

App Development

Copy

iOS Updates

GDPR

QA

Accounting

Design/UX

Marketing

Bug Reports

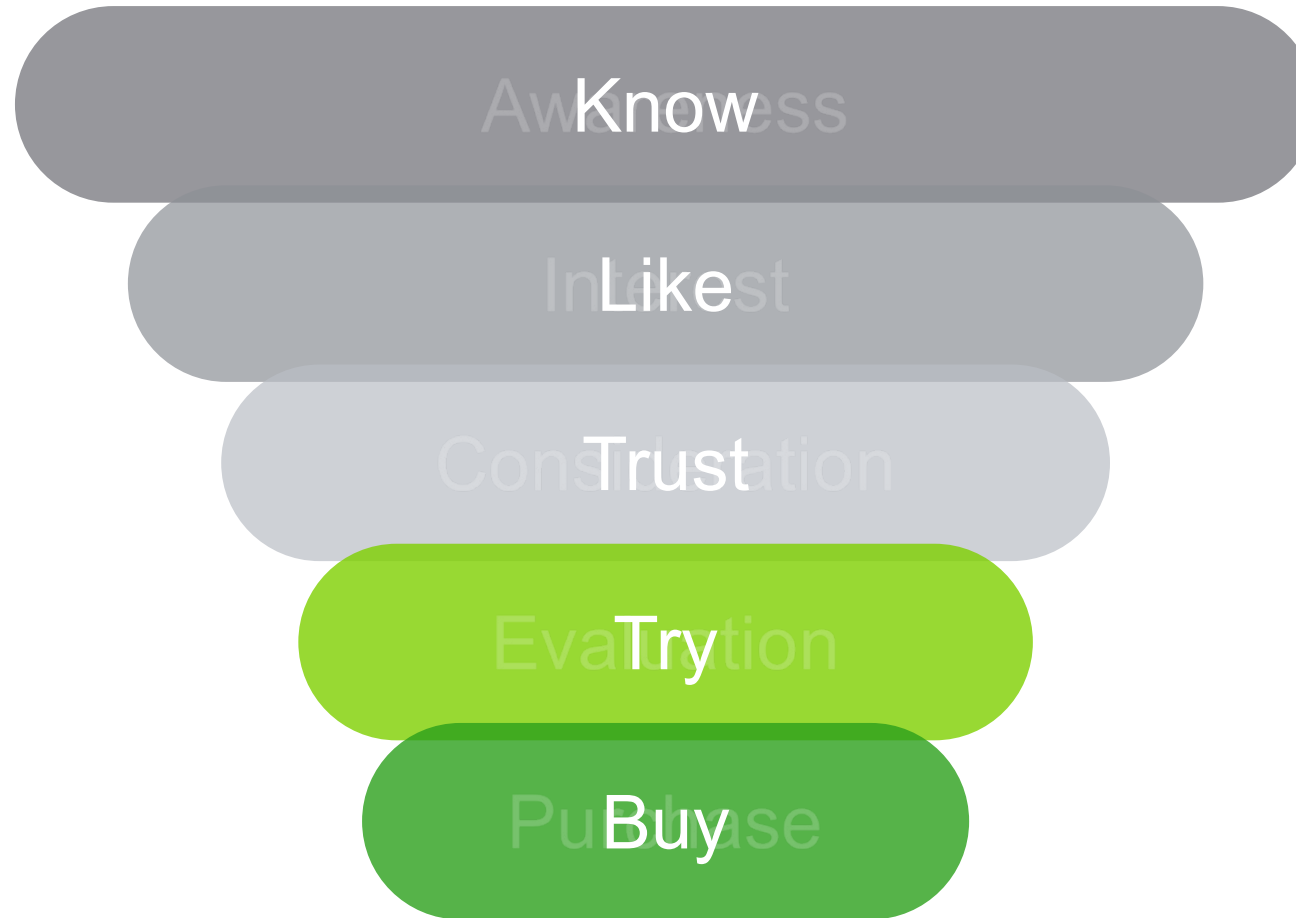
# 68% of partners want to improve their marketing

(Problem is – it's at the bottom of their to-do list!)

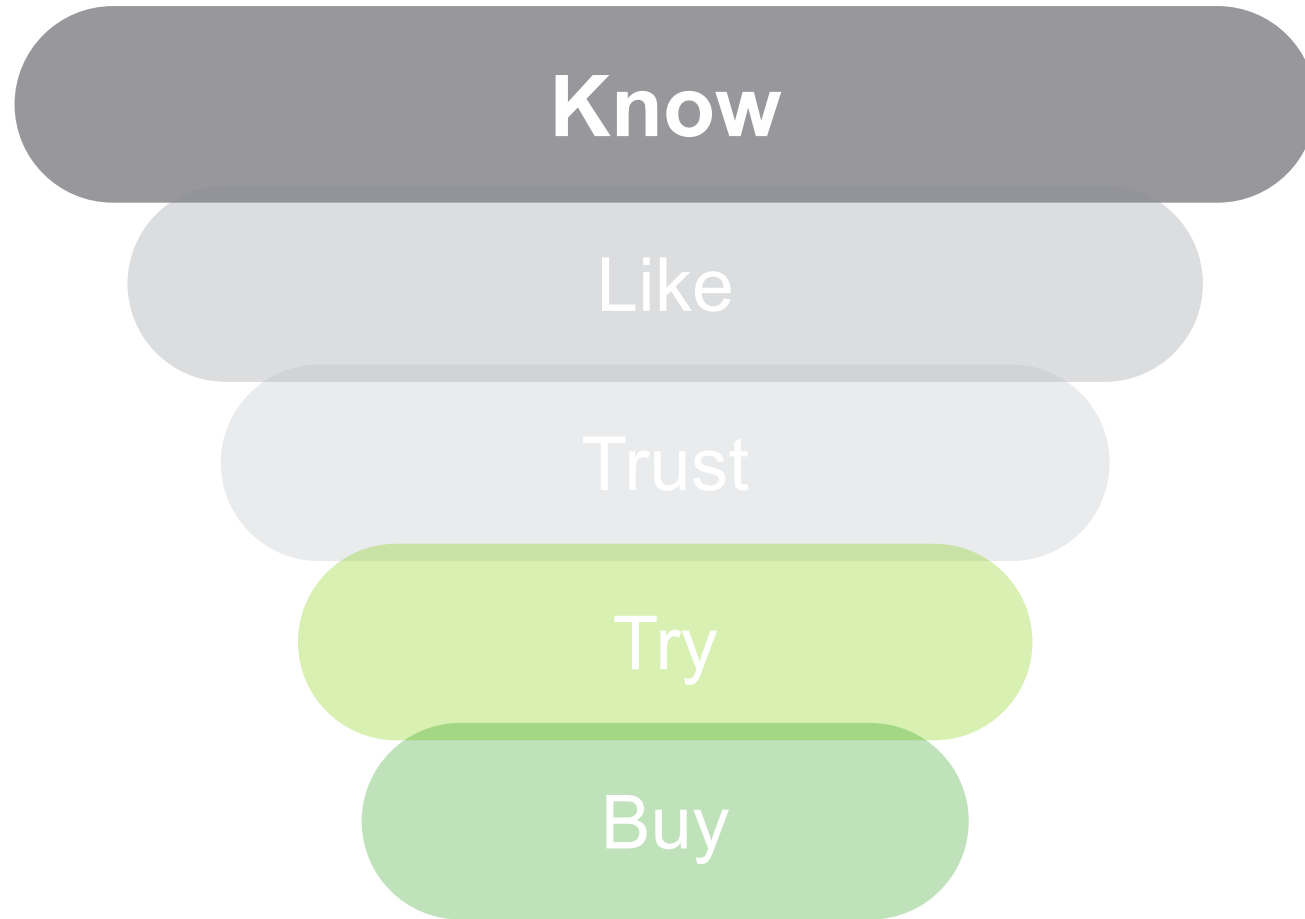
# Traditional marketing funnel



# Demystifying the marketing funnel



# Demystifying the marketing funnel



**Do your customers  
KNOW how to find you?**

- Are you speaking your customers language?
- Are you in the right categories?

# Best fit categories

App Listing

NOTE: Once you submit the app for review, you can always come back to complete additional App Listings and submit for separate marketing reviews later.

Category

To improve searchability as users browse for apps, select the category that your app belongs to.

Primary category

Please select category

Commission Management

eCommerce

CRM

Data Security/Backup

Estimating and Bidding

Secondary category

Please select category

Australia

Canada

United Kingdom

India

United States

App Listing

NOTE: Once you submit the app for review, you can always come back to complete additional App Listings and submit for separate marketing reviews later.

Category

To improve searchability as users browse for apps, select the category that your app belongs to.

Primary category

CRM

Secondary category (optional)

Please select category

Time Tracking

Data Sync

Field Service Management

Marketing

Contact Management

Point of Sale Solution

Australia

Canada

United Kingdom

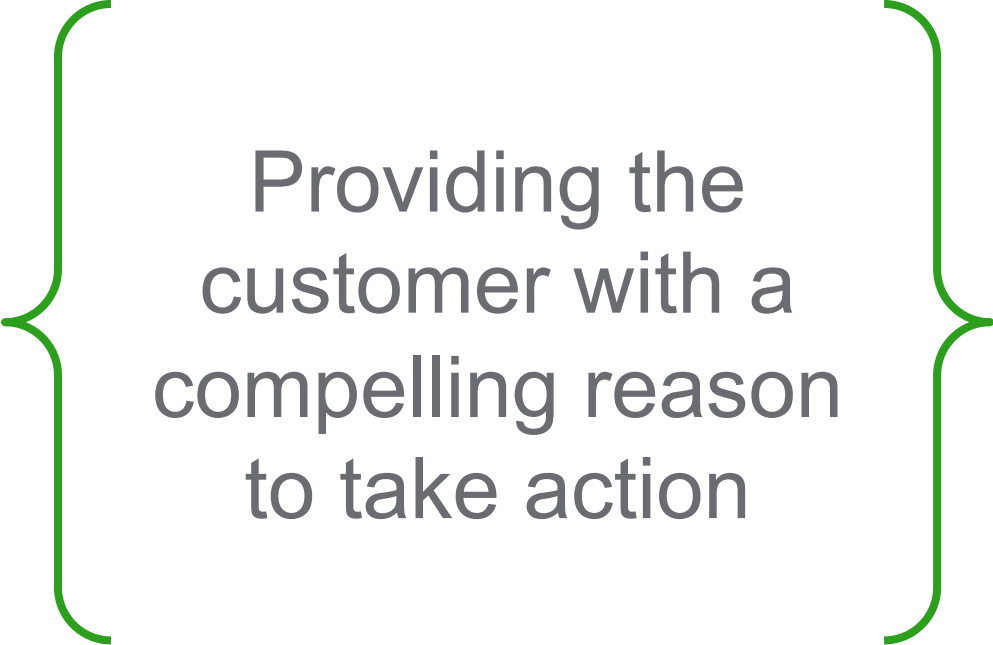
India

United States

Find your best fit categories.

# Context and motivation

Making marketing relevant

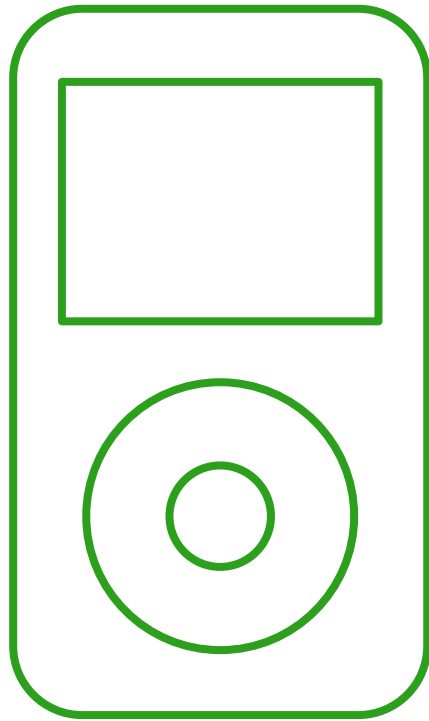


Providing the customer with a compelling reason to take action



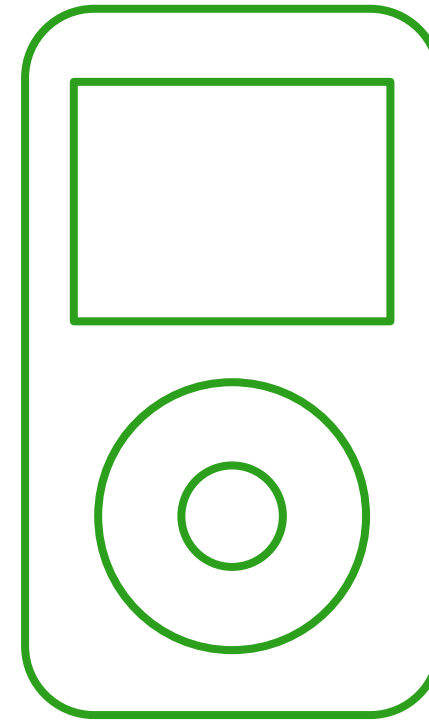
Teaching the customer something new about their business needs and challenges

Source: Gartner via <https://trackmaven.com/blog/b2c-b2b-marketing-research/>.



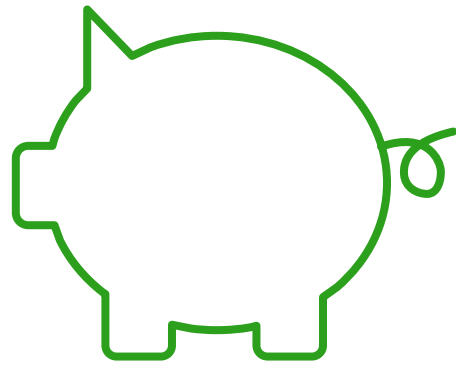
**Storage for  
1GB of MP3s**

**VS**

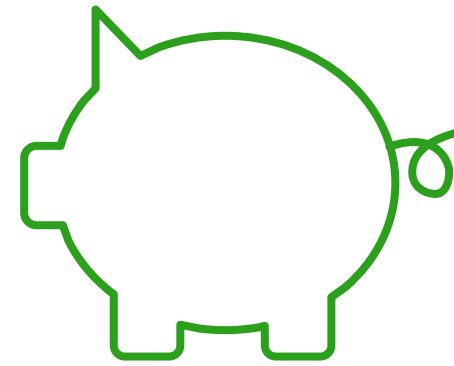


**1,000 songs  
in your pocket**





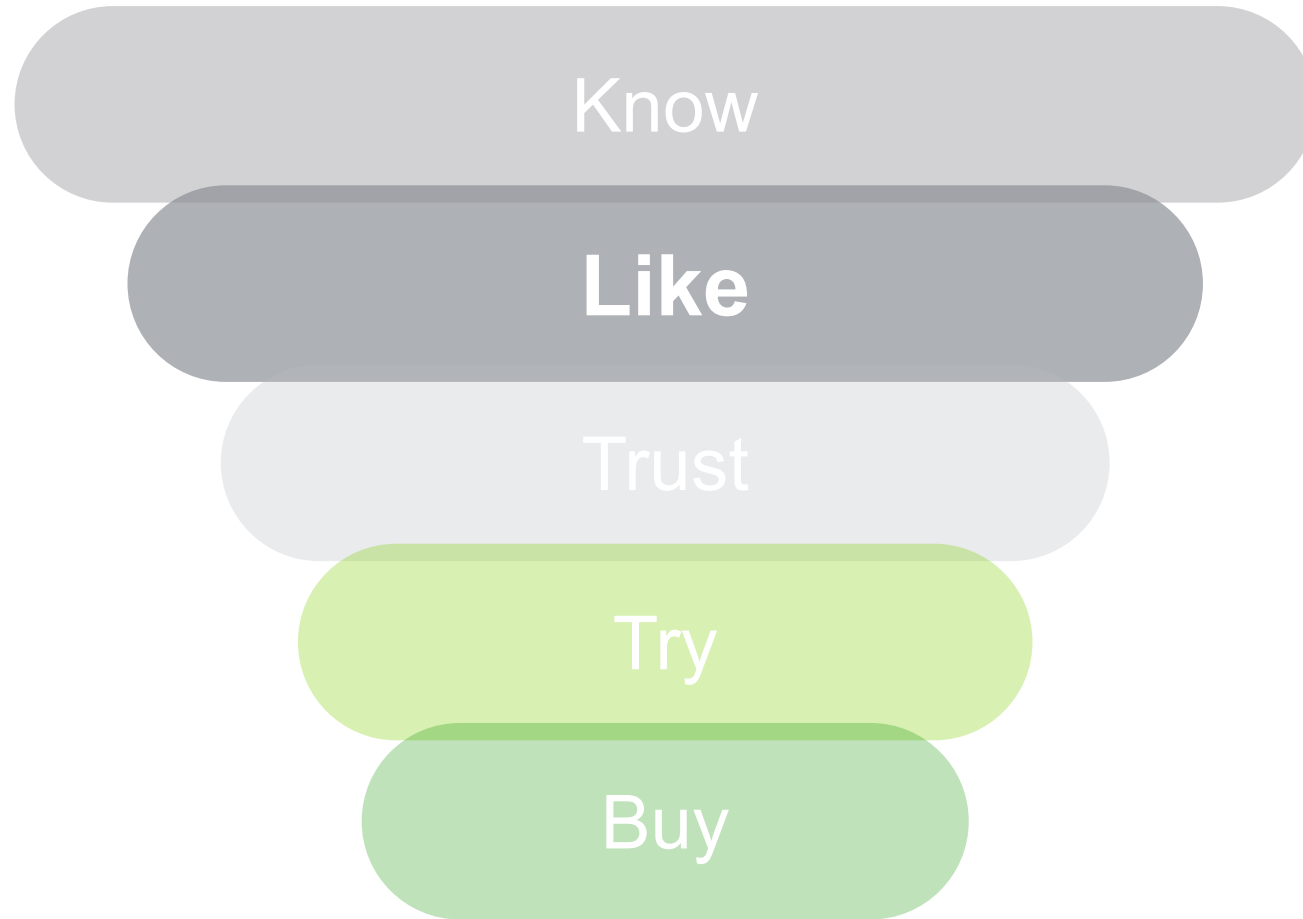
**VS**



**Financial  
Management**

**Budget**

# Demystifying the marketing funnel



**Do your customers LIKE what you have to say?**

- Is your headline and description optimized for their challenge?
- Can you demonstrate that you will solve their problem?



**Vitamin**



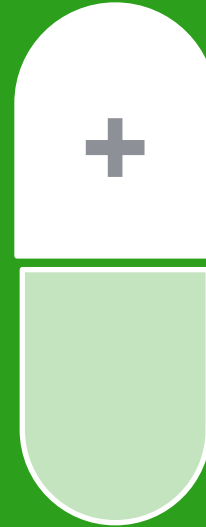
**Painkiller**

“

Easy receipt and  
expense tracking  
integrated with  
QuickBooks



**Vitamin**

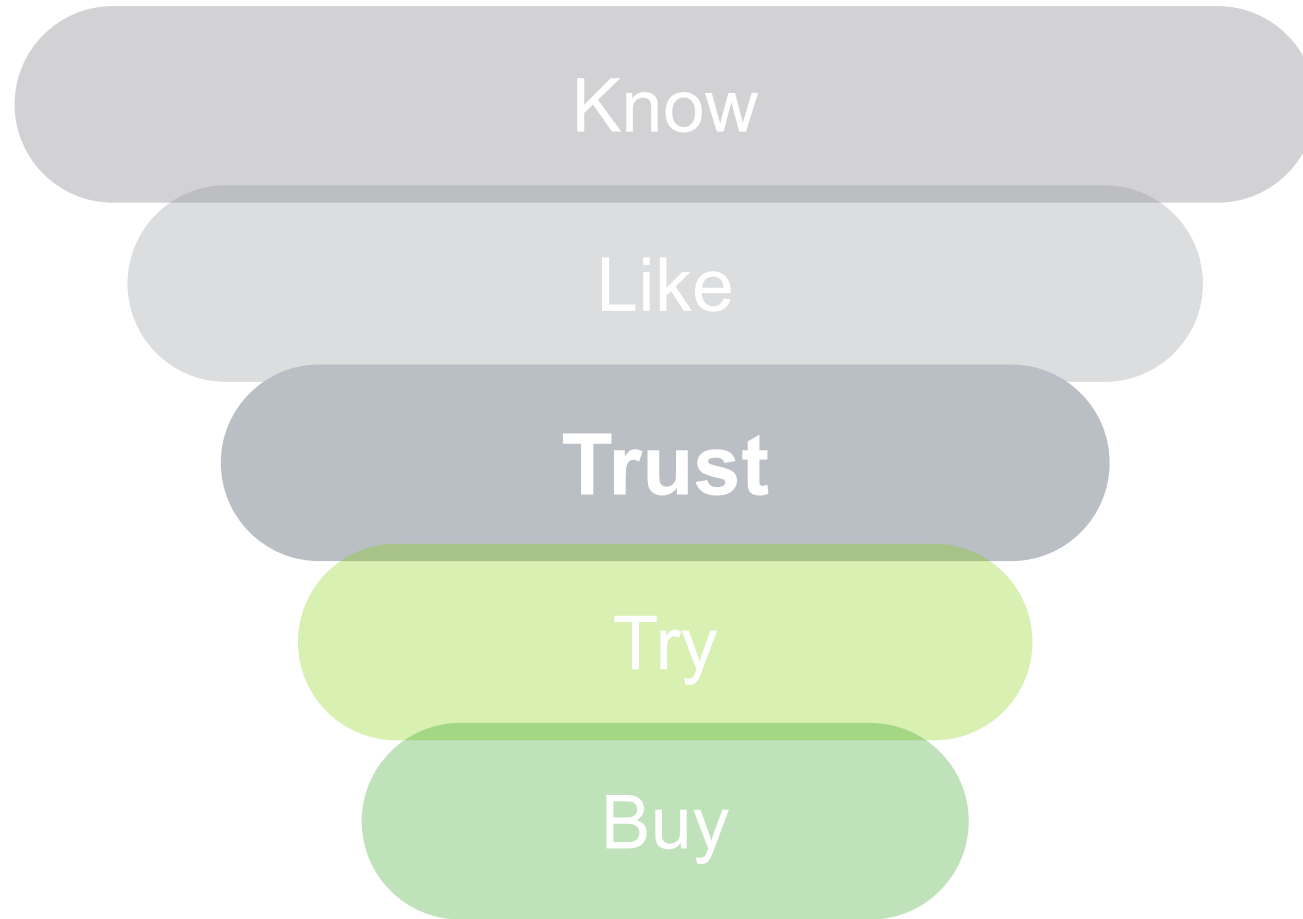


**Painkiller**

“

Stop wasting time  
with manual data  
entry – automate  
your expenses  
today

# Demystifying the marketing funnel



**How can they TRUST your app to solve their problem?**

- Do you have reviews or testimonials to build trust?

# How much do reviews count?

  
1 review = 10%

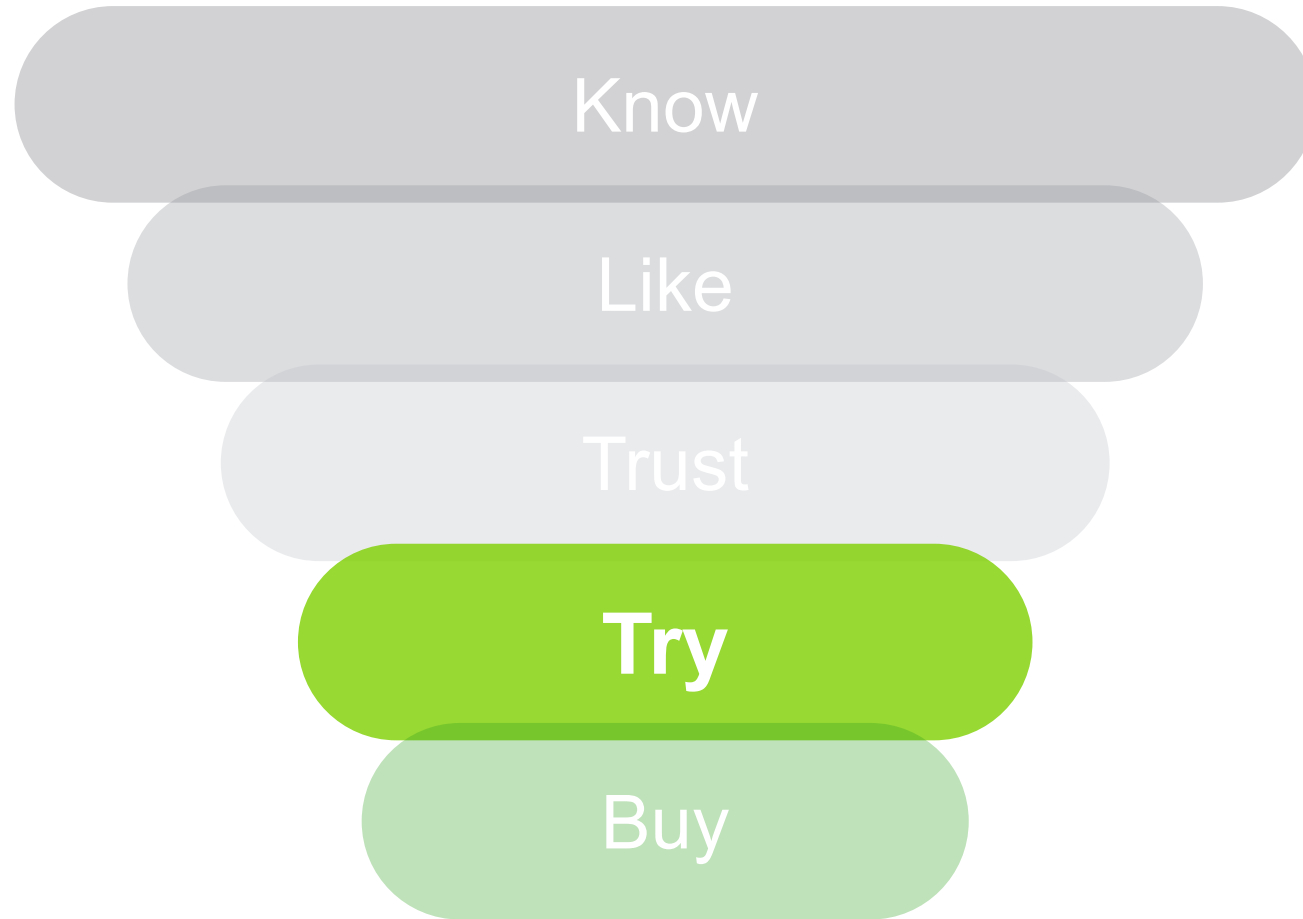
---

  
50 reviews = 30%

---

Source: Barzaarvoice.

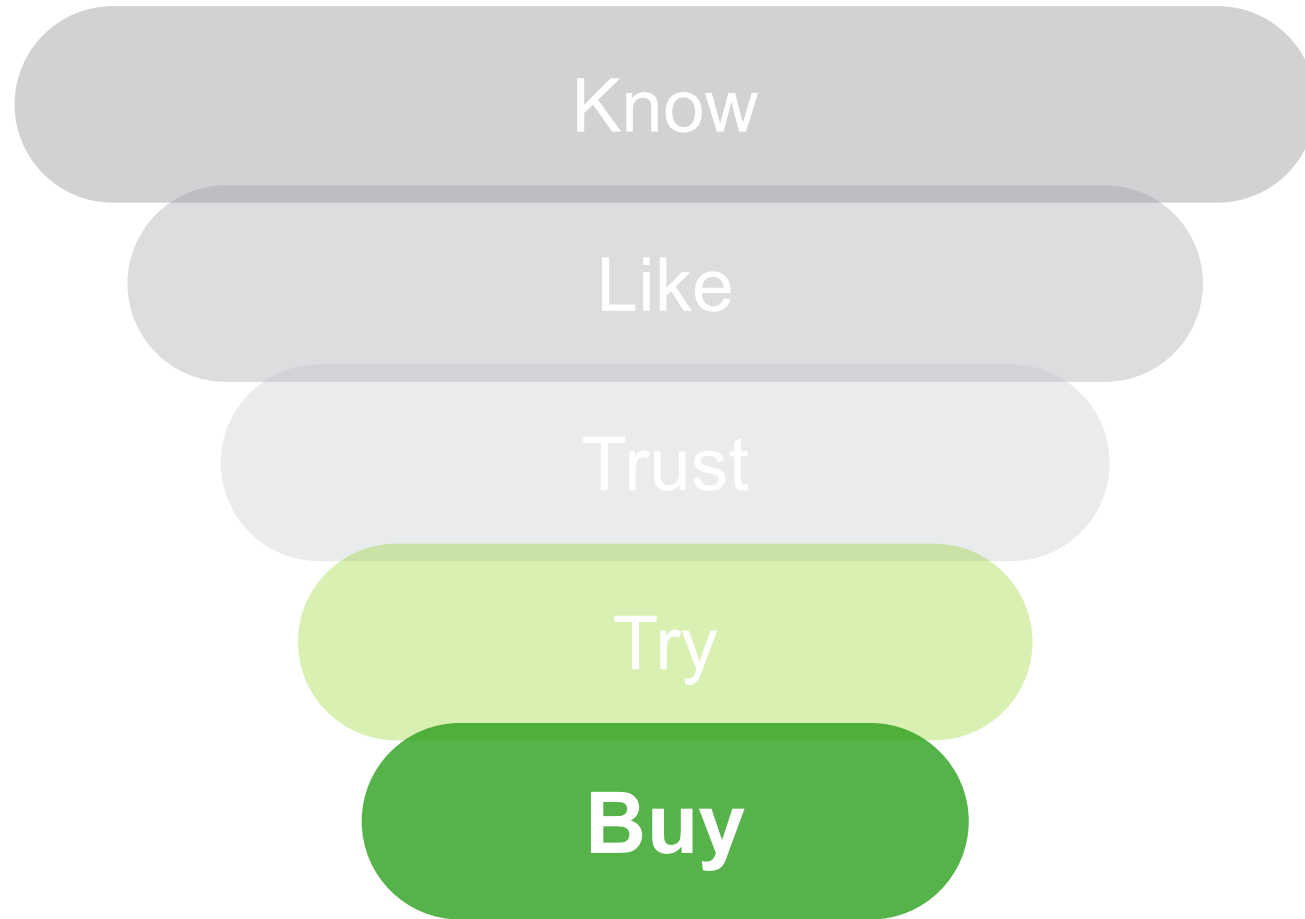
# Demystifying the marketing funnel



## Do your customers **TRY** your product?

- Do you have a trial?
- If not – can you create a video to demonstrate your product?

# Demystifying the marketing funnel



**Do your customers convert to **BUY** your product?**

- Do you provide an onboarding experience that steps the user through their first use?
- Can you personalize the experience to make it relevant to them?



**But wait – there's more!**



# Demystifying the marketing funnel



# Demystifying the marketing funnel



# Demystifying the marketing funnel



## Do you **KEEP** your customers past 90 days?

- How can you keep your customers and increase your 90 day retention?
- How can you keep your churn rate low?
- Are you addressing negative reviews?

# Demystifying the marketing funnel

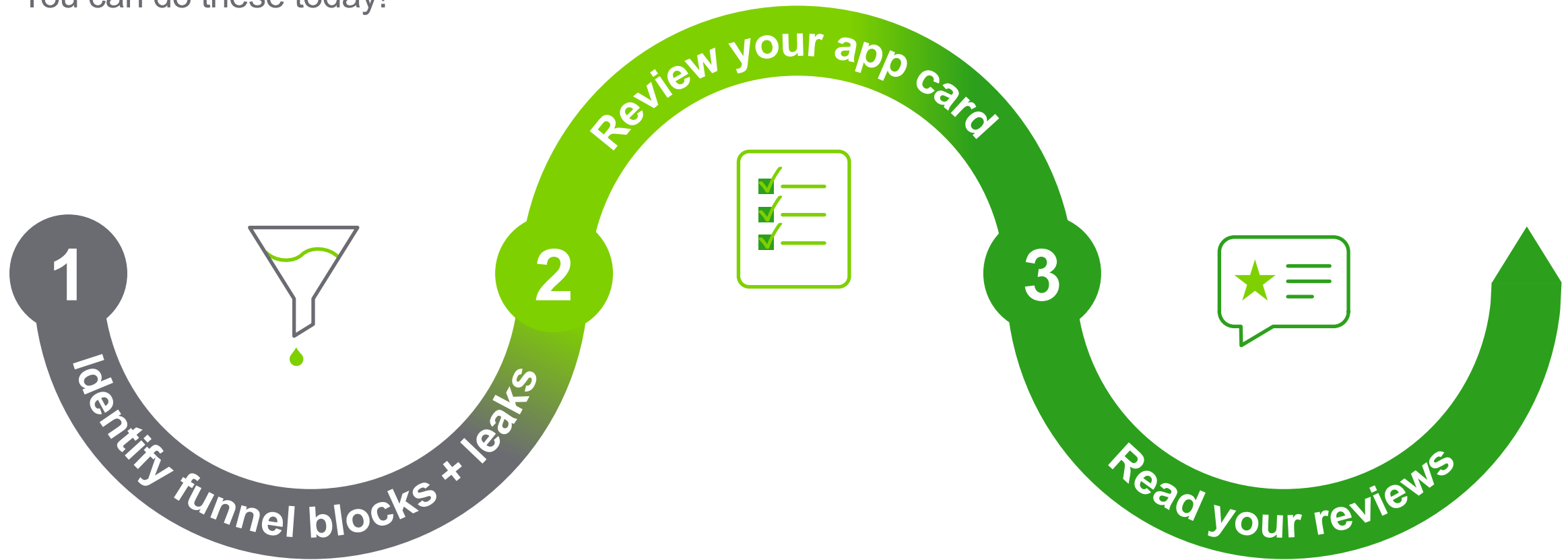


## Do your customers **REFER** others?

- Do you make it easy for customers to refer your app?
- Do you prompt your customers for reviews or testimonials?

# Summary

You can do these today!



# Questions?

# So what have we gone through?



It All Starts  
with the  
Customer



Behind the App  
Marketplace  
Curtain



Demystifying  
the Marketing  
Funnel



Q&A

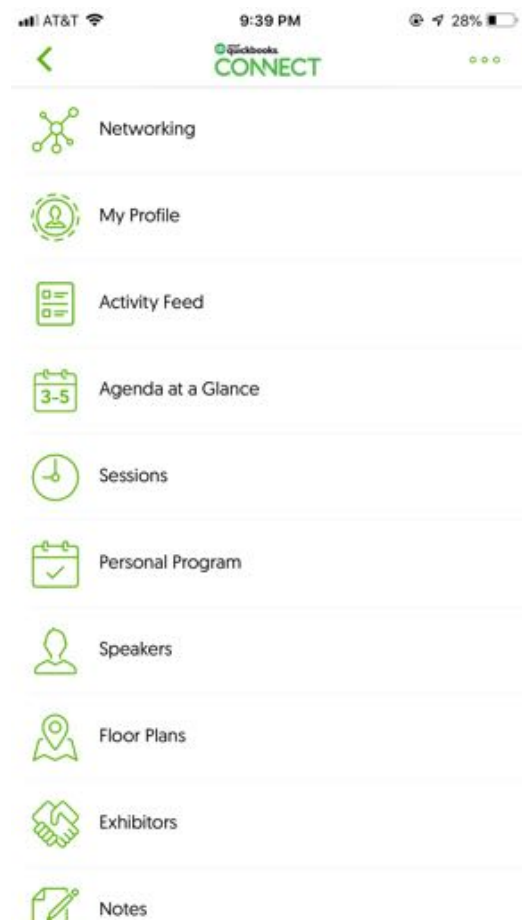


Feedback!

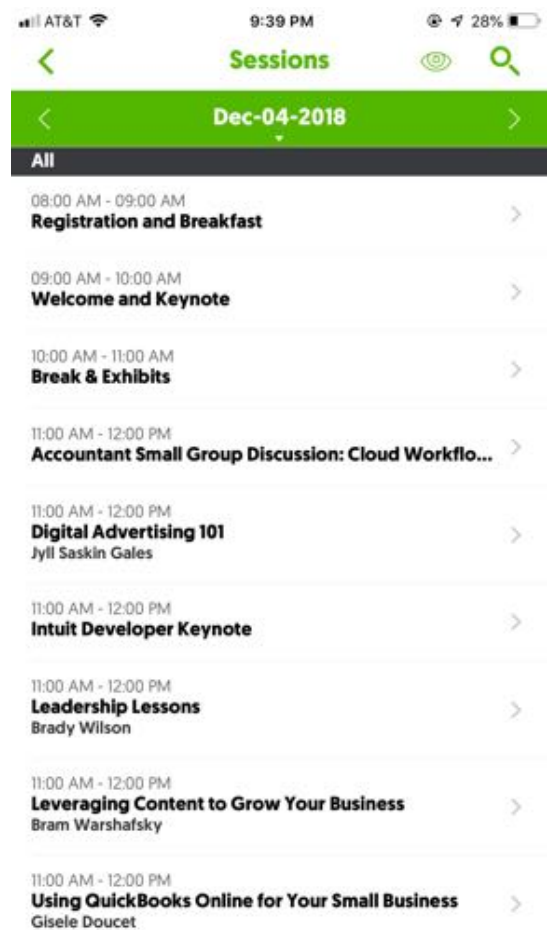


# Rate this session in the mobile app

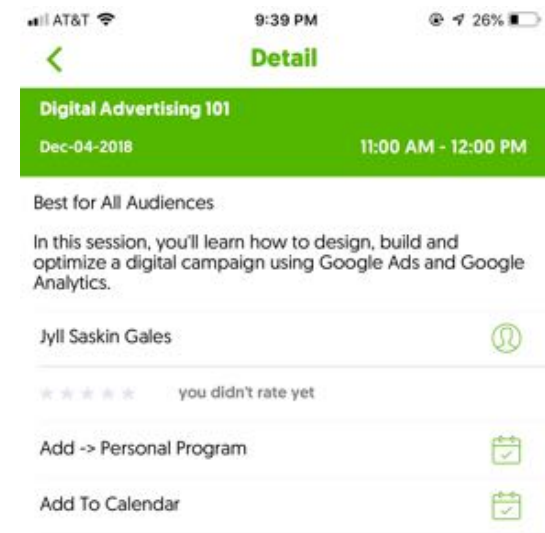
## 1. Select Sessions



## 2. Select Title



## 3. Add Rating



# Material Download

Session slides can be found on the QuickBooks Connect agenda page

- 1) Find the session on the agenda
- 2) Select + for more information
- 3) Download PDF of slides

<https://can.quickbooksconnect.com/agenda/>

11:00 am-12:00 pm	Breakout Sessions	
	Digital Advertising 101	+
	Leveraging Content to Grow Your Business	+
	Leadership Lessons	+
	Using QuickBooks Online for Your Small Business	+
	Warrior Approach to Productivity • session repeats	+
	Accountant Small Group Discussion: Cloud Workflows	+
	Intuit Developer Keynote • session repeats	+

