# Try & Buy Model research

**-brief overview**

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> "Where real improvement can be achieved by making major changes, the interface designer must balance the legitimate use of familiar paradigms, which ease the learning process, against the enhanced usability that can be attained by abandoning them.
> ~Jef Raskin

IBM ECM
Design Studio

Create a **seamless try & buy experience** for the user to allow them an **introduction to the base features** of the product **in a meaningful way**.

Users need to have confidence that the product will suit their needs, and **the transition from try to buy MUST be seamless with no data loss**.

Any **anomaly or deviation** from expectations, and your user will immediately **lose confidence in your product**.

This is why it is key to **set and maintain expectations** for your users right from the start.

# some basic questions you need to answer

- from your user research, what product features are **most important**?
- of those features, **which are viable** for a meaningful t&b experience?
- those features that are t&b candidates, will they be **completely seamless** in migrating to 'buy'?
- will the inaccessible features in the ui be disabled or hidden, and **how will that affect the 'try' experience and expectation**?
- how will you handle the **back-end data/account storage**?
- will your offering be **limited**?
- **how will you migrate** from 'try' to 'buy'?
- **how will you get feedback** for your offering?

from your user research, what product features are **most important**?

You must poll your users and do a card sort with them that list all of your features from **most important, to least**.

You must **provide value to your users** the minute they log in to your offering.

Giving your users access to lesser important features **does not deliver value and will frustrate your users.**

of those features, **which are viable** for a meaningful t&b experience?

Now that you have an ordered importance, you need to identify which of those are viable candidates for a t&b offering.

I would suggest that you accommodate the **top 2 in the list** in order for users to be able to assess the product fairly.

those features that are t&b candidates, will they be **completely seamless** in migrating to 'buy'?

It is key that the **migration is seamless**. Users greatly dislike re-entering data and it frustrates them, as well as has them wondering **why there isn't something as 'simple' as data persistence during migration**.

This questioning can also lead to distrust in the product.

If you need additional data from them, that is fine, but you MUST persist pre-existing data.

those features that are t&b candidates, will they be **completely seamless** in migrating to 'buy'?

eg. : As a 'try' customer, I was only required to enter my name and my company name, but **as a 'buy' customer, much more information is needed**.

My name and company should be **pre-populated when I log in** to my new purchased account.

Any **data should port seamlessly** into the new, fully functional account, with NO data loss.

# will the inaccessible features in the ui be disabled or hidden, and **how will that affect the 'try' experience and expectation**?

Now that you have your 'try' features you need to decide if you will push the full UI with some features disabled, or if you hide the non-'try' features completely.

This takes much deliberation. Depending on the nature of your product, **you MAY gain more purchases if you show**, but disable, these features. This can be a carrot, enticing users.

*CAVEAT: a one-off of this model is to allow users to click the feature, and a popup tells them that this is disabled in the trial version. This can be annoying, yet enticing at the same time. Do your research.*

If you decide to hide them, there is less distraction, however **the user won't know what they are missing** in the full version, but they can access everything shown. Do your research.

# how will you handle the **back-end data/account storage**?

Now that you have your candidates, you need to be able to **fully maintain** those, in light that **if a user can do something, they will.**

*eg.: if you don't limit data upload, a user can, and will, completely flood your system if you are offering a cloud-hosted storage environment.*

**How many accounts will you be able to fully manage** with the features defined?

**How long will your trial last**?

**How will you handle closing the offering**? (especially if you are temporarily hosting user data)

# will your offering be **limited**?

All good things come to an end,
and you need to decide if your trial will be:

- time-based

- inactivity-based

- indefinite limited service

- combination of these

Regardless of what you decide, **always notify the user** (multiple times) that their account will be sunset, and remediation actions. Deleting a user's data without notification will never be a good experience.

# **how will you migrate** from 'try' to 'buy'?

You will need to ensure the **seamless porting of data** from the trial servers to the customer servers.

*eg., If location metadata needs to be updated, it should be invisible to the customer, and all back-end api connections should map and update without the customer ever having to do anything.*

# **how will you get feedback** for your offering?

If you decide to employ a feedback mechanism for your users to leverage best practices and surface issues/gaps in the experience, **it is imperative that you faithfully maintain the site/board**.

If users feel that their issues are not being acknowledged/addressed, **they will not participate in the future, as they feel their contribution is being ignored**.

This is not to say that you must cater to every user, but thoughtfully **address each user comment within 24 hours**. Have an **auto-notification that acknowledges feedback receipt**, if that is your model.

**Contextually group like issues/comments** if possible, a FAQ section.

I have seen many trial feedback mechanisms **fail due to lack of maintenance/acknowledgement**.

users need to have an **accurate, reliable, trial experience** in order to validly assess the product, **with a seamless 'buy' migration**.