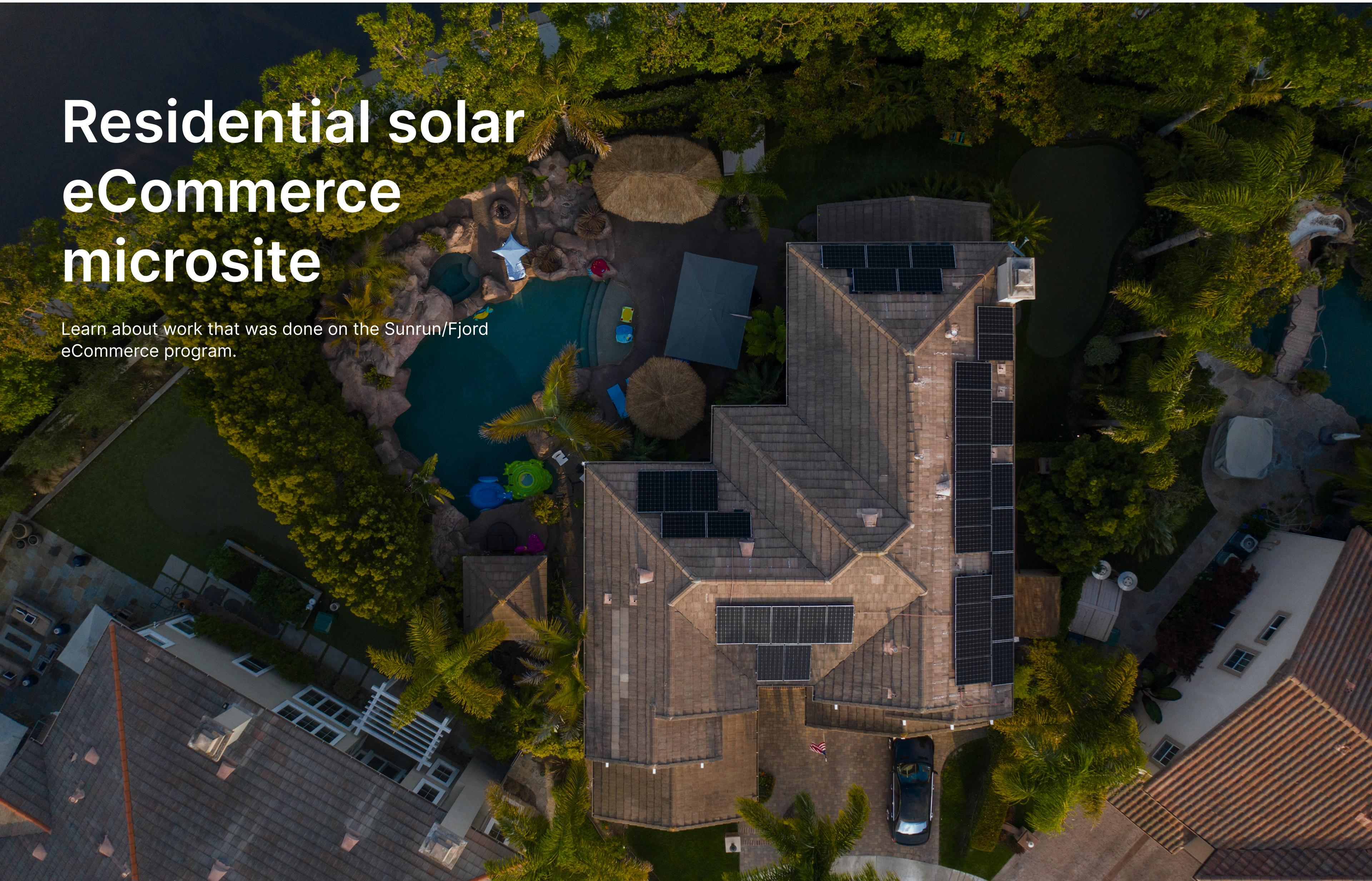


# Residential solar eCommerce microsite

Learn about work that was done on the Sunrun/Fjord eCommerce program.





# Meet the design team

We brought together an interdisciplinary team to help us create our designs.



**Nicole Berman**  
Visual Designer



**Pedro Matarrita Brenes**  
Service & Interaction Designer



**John Carter**  
Design Lead



**Tony Contreras**  
Design Lead



**Carol Cordero**  
Visual Designer



**Jonathan Horiel**  
Content Strategist



**Brayden Iwasaki**  
Product Designer



**Aishwarya Janwadkar**  
Service & Interaction Designer



**Felix Liu**  
Service & Interaction Designer



**Alexis Lowe**  
Senior Manager



**Paz Quesada**  
Design Researcher

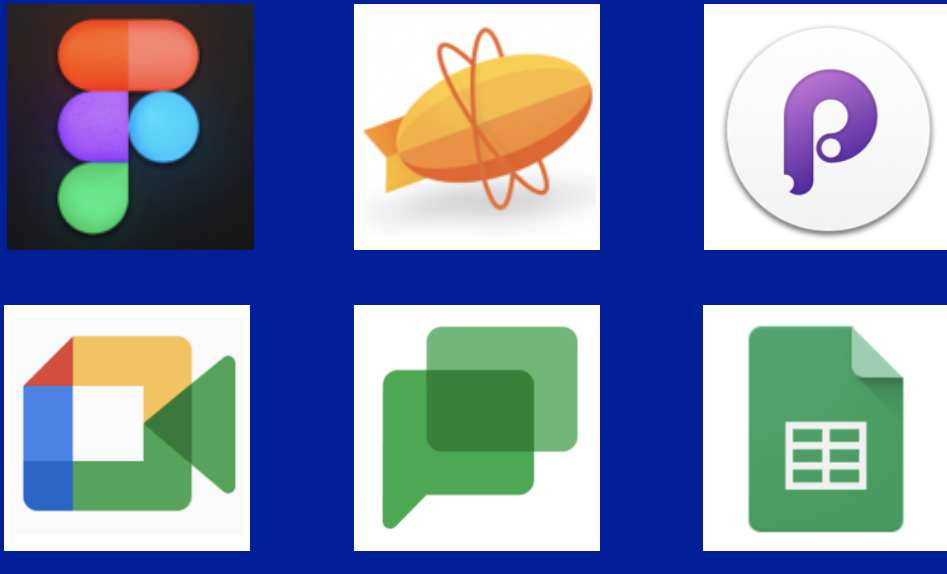


**Natalie Zhang**  
Product Designer



# Dev collaboration

Learn how we worked with the development and product teams to ensure tight communication and smooth handoffs



## Overview

This project involved delivering pixel-perfect design assets and specifications to joint Accenture & Sunrun development teams. The design team developed a great working relationship with the engineers, and utilized various tools to communicate efficiently.

## Ways of working

Having a strong partnership between the design and the development team is crucial. Shipping software is challenging enough when everyone is physically located in the same location, and doing it 100% remotely is an even bigger challenge.

The collective team focused on minimizing the amount of meetings, and we agreed on having daily 1 hour optional **open office hours** where the development team could come in with questions or provide feedback.

This, coupled with ad-hoc Q&A on Google Chat, gave us many opportunities to collaborate throughout the build process.

## Visibility and shared knowledge

During the Discover & Describe phase of the engagement, the design team invited all of the engineers to sit in on the weekly workshops while the design team showed work in progress. We encouraged everyone to share feedback on the wireframes and the flows as we were constructing the experience.

The weekly shareouts also encouraged the Product Owners to provide guidance, and for the designers to influence the user stories.

## Holistic plan and aggressive deadlines

Once we landed on a holistic end to end experience for both Solar and Ford, we worked with the Product Managers, the Dev leads, and the Program leads to develop a roadmap.

The plan was mostly agile, and allowed the collective team to have approximately three to four 2-week sprints to collect requirements, conduct research, design, and deliver. *Mostly* agile because we learned of aggressive dates for the Ford launch, which we had to work backwards from.

## Design tools to facilitate handoffs

**Principle** was used to design, and demo animation of the landing page for R1.

Principle does not generate code that the developers could use, but an MP4 was exported and attached to a specific Jira ticket to explain the interaction.

**Zeplin** was used for delivering pixel perfect designs for four different widths: 480, 768, 1440 and 1640.

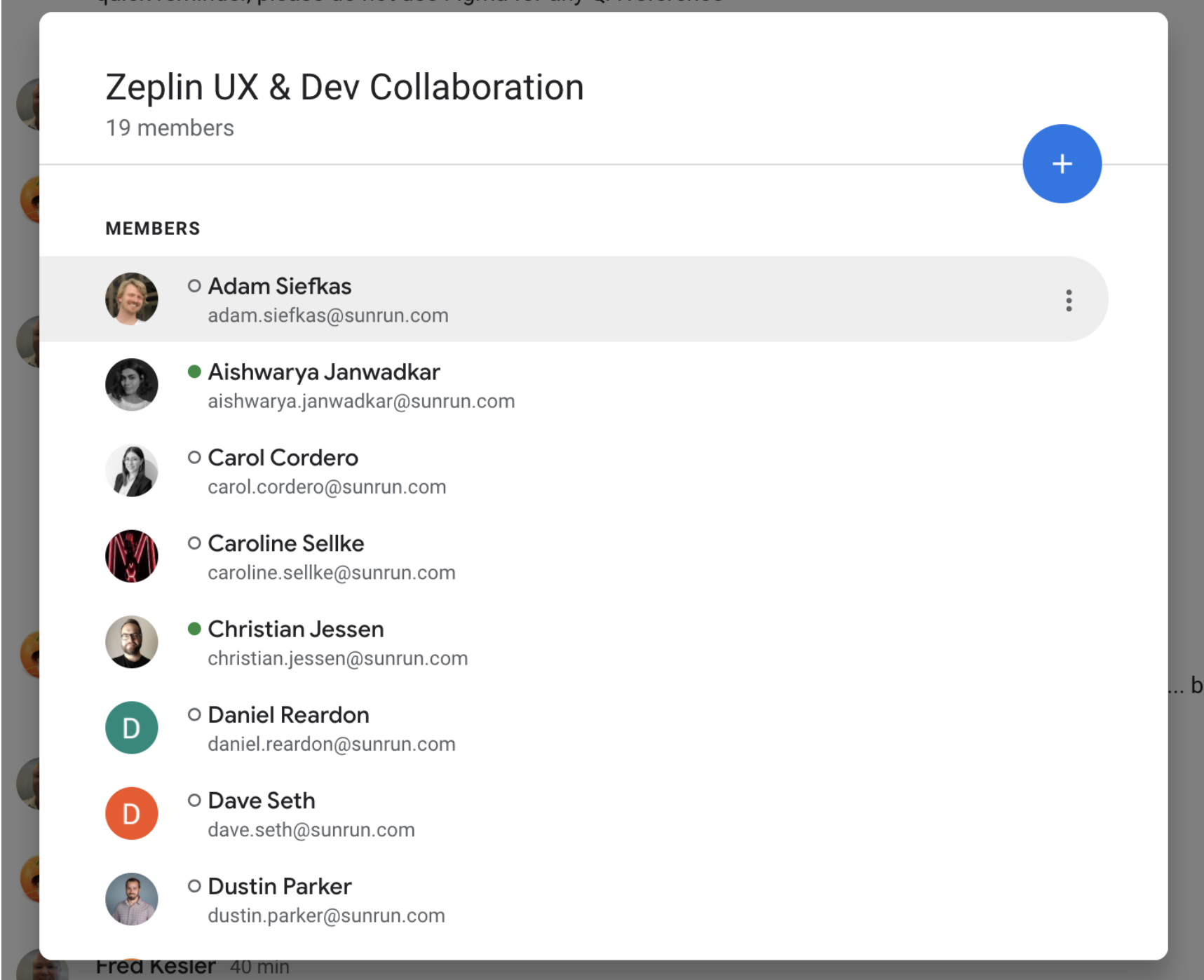
Every screen in both Solar and Ford were delivered in 480w, and only key screens were delivered in the other widths.

Ford screens were organized by sections that corresponded with parts of the flow, cross-linked to corresponding Jira tickets.

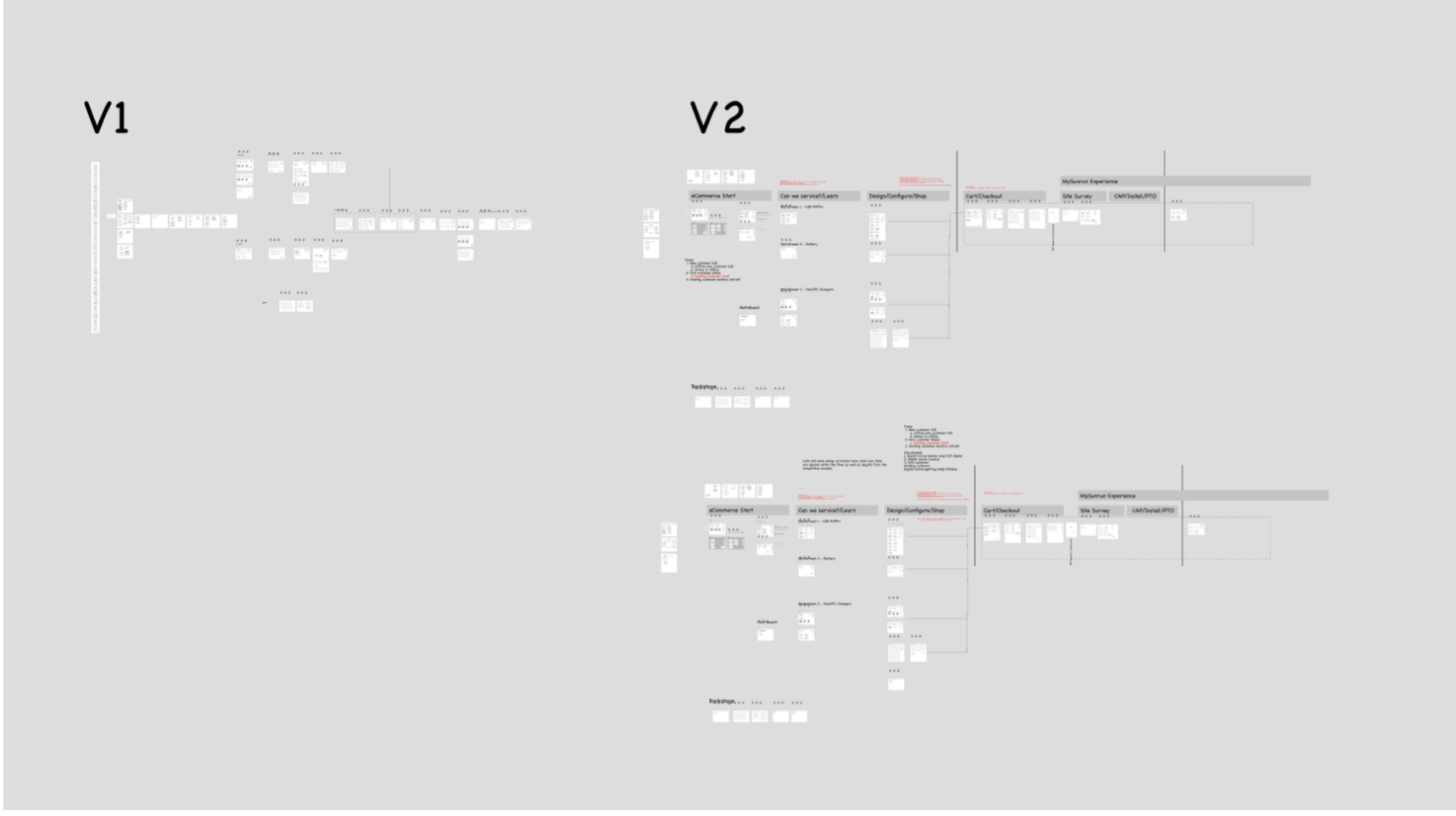
**Zeplin** released a new feature called Flow which provided the ability to add screens to large canvases that can connect to each other via arrows. It provided an excellent way to show developers and business how the end-to-end flow fit together, and made communicating updates easier.

Text styles, colors, components, and other global elements are cataloged in the **Zeplin** Styleguide

The Zeplin plugin for **Jira** was installed to provide bi-directional links between the developer tickets, and the corresponding UI screens. This allowed the cross-functional team the ability to quickly attach, view, and reference UI screens.



Partial view of the Google Chat participants list



Early end-to-end flows used in workshops

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# Solar and Ford followed a similar approach to design and development

## What we did

We went through multiple sprints where we created wireframes and prototypes to test with users. Once we received feedback, we incorporated the changes and eventually built out multiple parts of our Solar and Ford flows.

### Defining our sprints

Sprints were defined based on what we wanted to accomplish for the project. We also incorporated the business timeline to build a roadmap to account for time required for planning, conducting and synthesizing research.

Our sprints hoped to resolve some of the challenges that we had heard from stakeholders earlier in the process.

#### 01 Human-Centric in Practice

We found out that there was an alignment on being human-centered but we needed to implement behaviours into practice.

“There’s never been a formal process for compensating customers for their time”

#### 02 Time for Design

Design wasn’t always baked into Sunrun’s delivery plans.

“Discovery time for design is cut short.”

“Engineers need to start building something”

#### 03 Work management challenges

We realized that stakeholders are still learning about how to best manage and plan UX work.

“We use two systems to manage our work and it’s difficult to know where to focus”

## Visibility and shared knowledge

During the Discover & Describe phase of the engagement, the design team invited all of the engineers to sit in on the weekly workshops while the design team showed work in progres. We encouraged everyone to share feedback on the wireframes and the flows as we were constructing the experience.

The weekly shareouts also encouraged the Product Owners to provide guidance, and for the designers to influence the user stories.

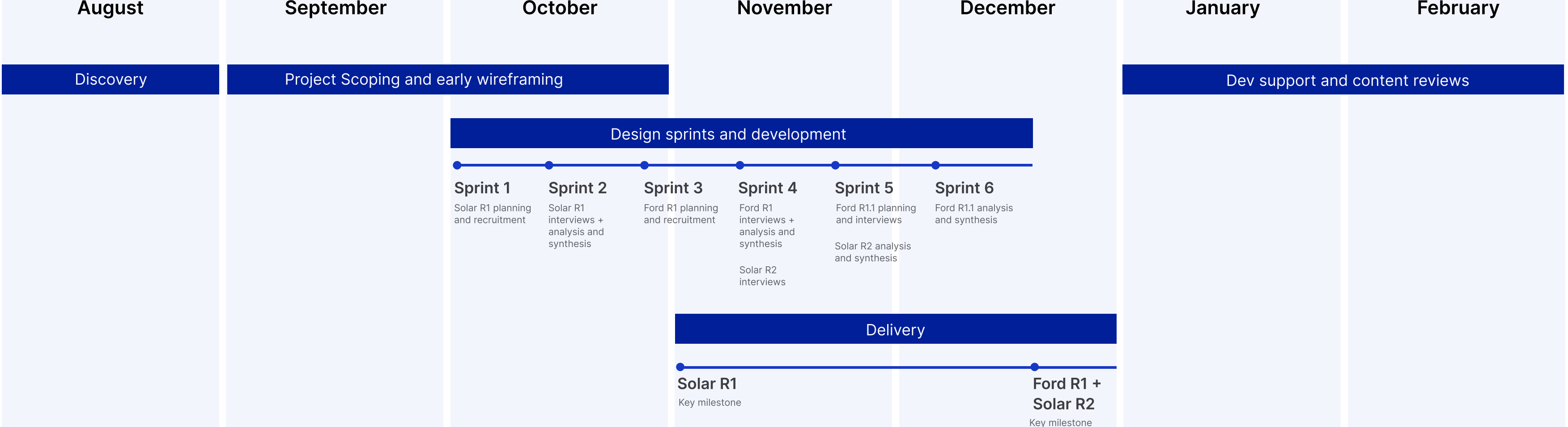
## Design system

There was no dedicated design system at the start of this project which led us to start early wireframing along with building the skeleton of the design sytem.

Our talented visual designers built a collection of reusable components, guided by our design principle and ideas emerging from the early wirframes.

### Project timeline

With the task to create two funtioning web and mobile experience, we were working with a very agressive timeline with each week packed with design, research and startegy efforts. We incorporated multiple sprints in our timeline to get continous feedback from our users and stakeholders.



## Design principles

Conducting stakeholder interviews also helped us establish our four design principles which were helpful in onboarding new team members and defining our design system and experience flow.

Be transparent

Transparency will be a core part of the eCommerce experience. We want to be transparent about pricing, process, and set expectations such that the user knows what is happening at every step of their home energy solution journey.

Be a good guide

We will gain customer trust by offering the right amount of help when they need it. We strive to communicate in language that our customers understand and show how our home energy solutions can provide value to their household. We will also give customers the ability to communicate with a rep if needed.

Make it engaging

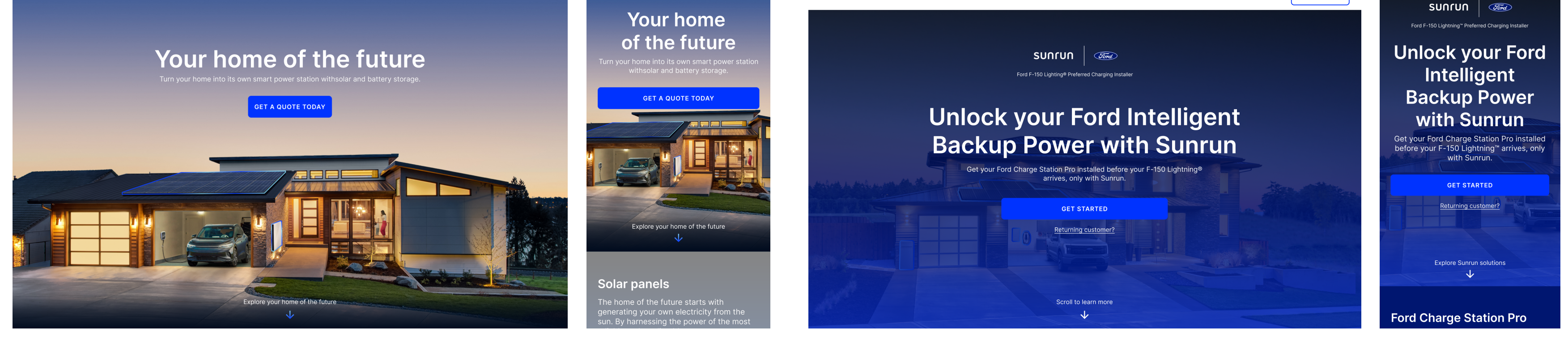
The eCommerce experience will be interactive and fun. Customers will learn more about solar in a way that is visual, dynamic, and engaging.

Personalize the experience

We strive to make the eCommerce experience personal and relevant to the user. For every piece of information a customer gives us about their home, we strive to provide value.

## Experiences we designed for

Over the 3 months of design and development period, we created two different ecommerce experiences : Solar products offered by Sunrun and EV Charger Installtion for the Ford F-150 Lightning Electric Truck through Sunrun with the ability to upsell Solar.



Solar web and mobile experience

Ford web and mobile experience

## Human-centered process

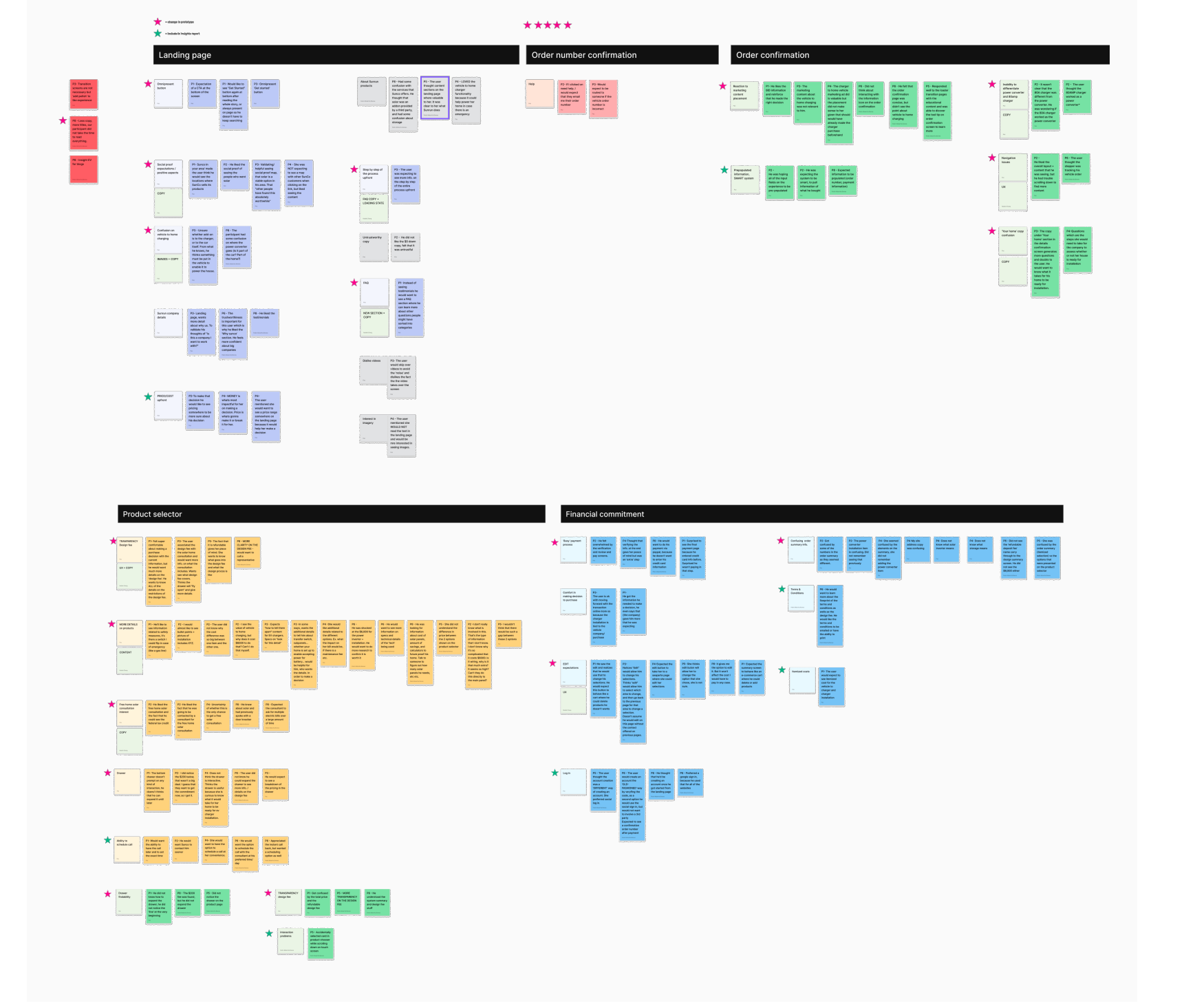
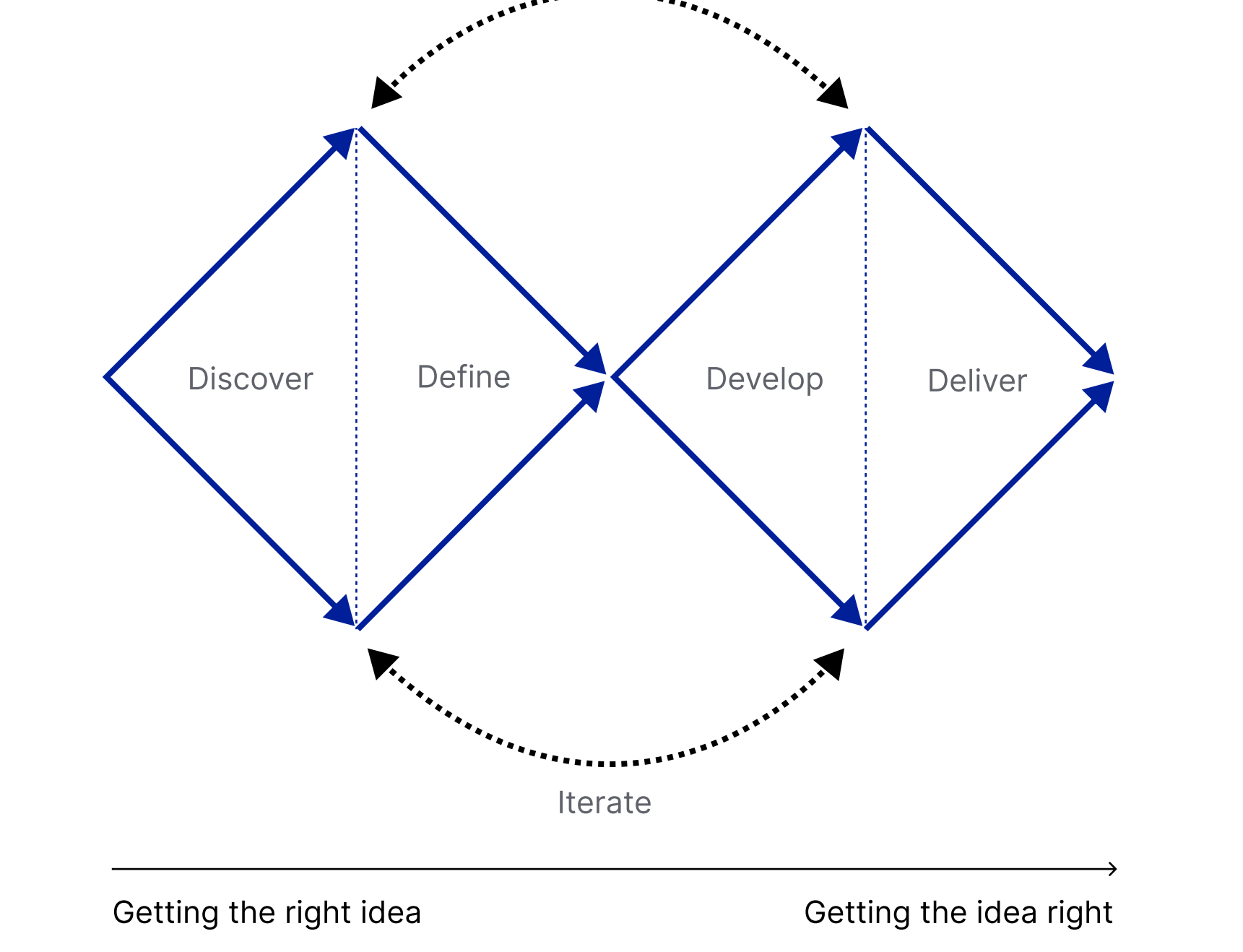
We strived to be design-led by considering the needs of our users first. We validated our designs with real users early on in the process, and incorporated existing Sunrun research on customer needs to guide our designs.

## Cross functional teams

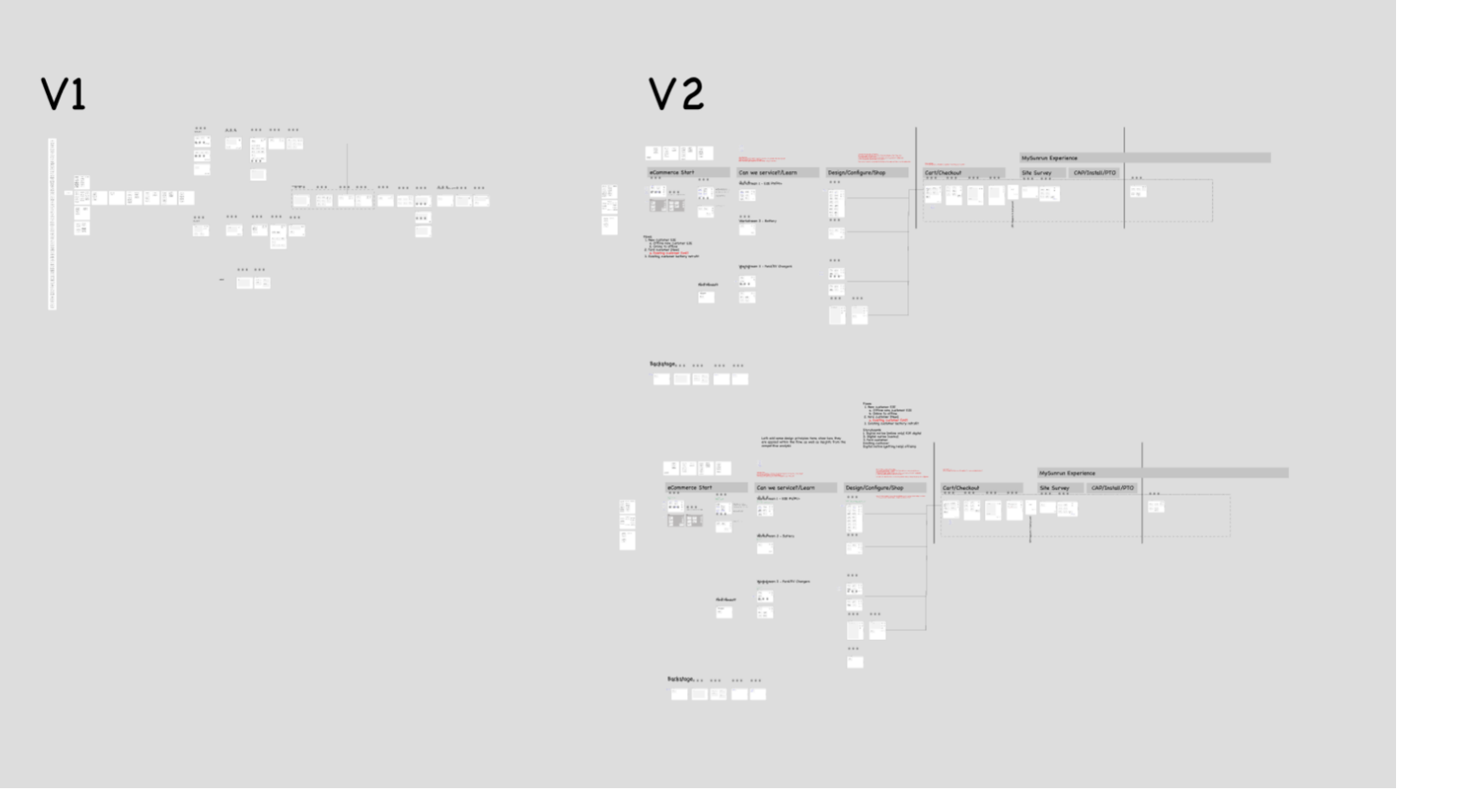
We worked as a cross-functional team across the entire Sunrun organization from product, development, design, legal, and marketing. This ensured that our designs served the needs of the business, were feasible to build within a tight timeframe, and also complied with regulatory standards.

## Established working patterns

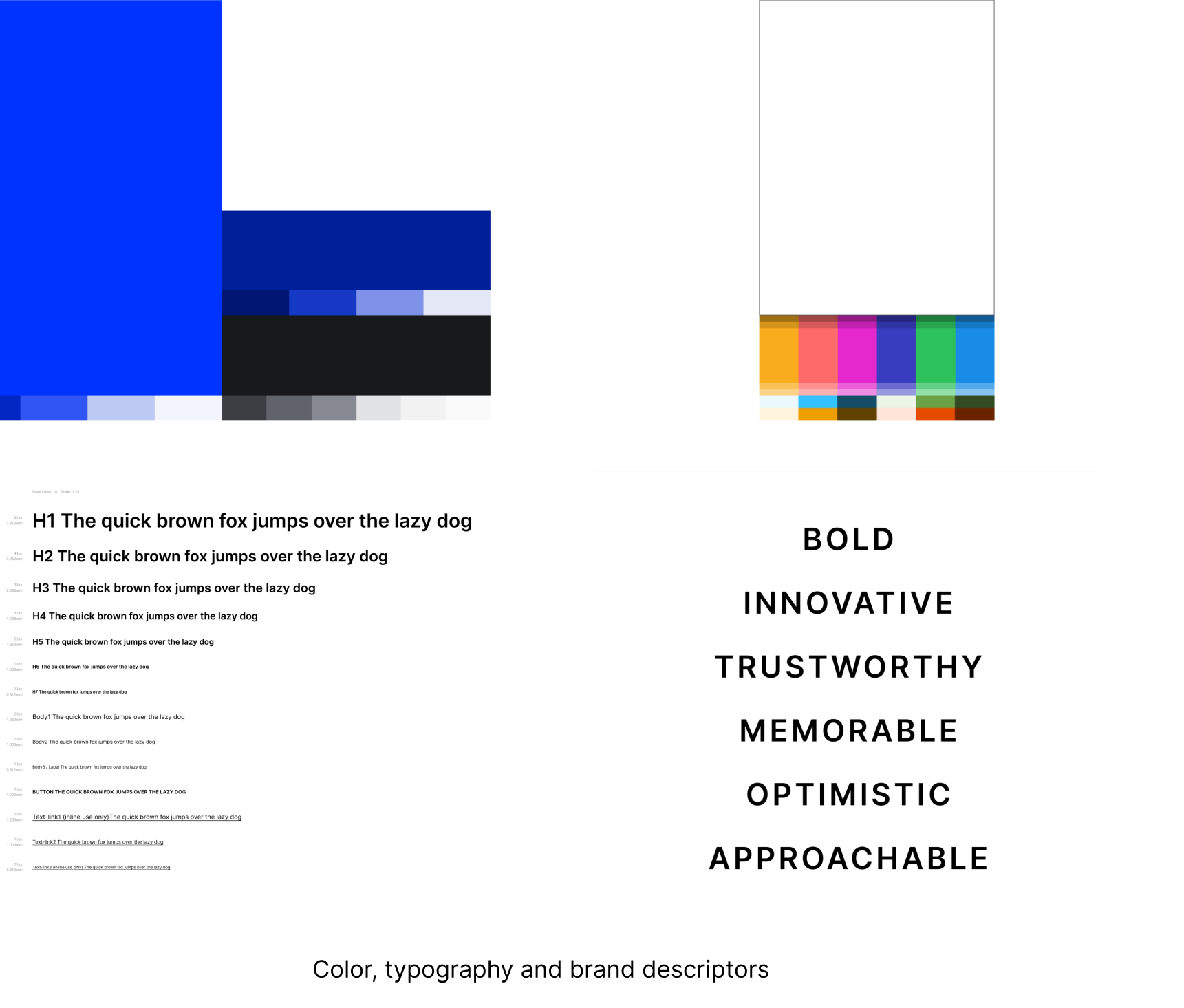
We established effective weekly working patterns and check in between different parts of the Sunrun organization, which promoted transparency into our process, and timely feedback from our stakeholders.



Ford research synthesis



Early end-to-end flows used in workshops



Color, typography and brand descriptors



Putting solar panels on your roof is a complicated and opaque process. Our challenge was to clearly articulate and communicate the value of home energy solutions, educate customers about putting these solutions in their homes, and guide them through the process, all in an interactive and engaging fashion.

Going through multiple rounds of design, research, and iteration, we developed a responsive web experience that was feasible to build within 4 months. The experience was slated to be released in South Carolina, a pilot market with minimal conflict to Sunrun's other customer acquisition channels.

Users stepped through a linear experience with 4 different sections, each accomplishing a different goal.

### Schedule call

Guide the customer to a sales representative who can complete the process.

Learn more about the design decisions and technical drivers behind each key section of our solar flow.

Read our consolidated research report and view clips of our interviews with prospective customers.



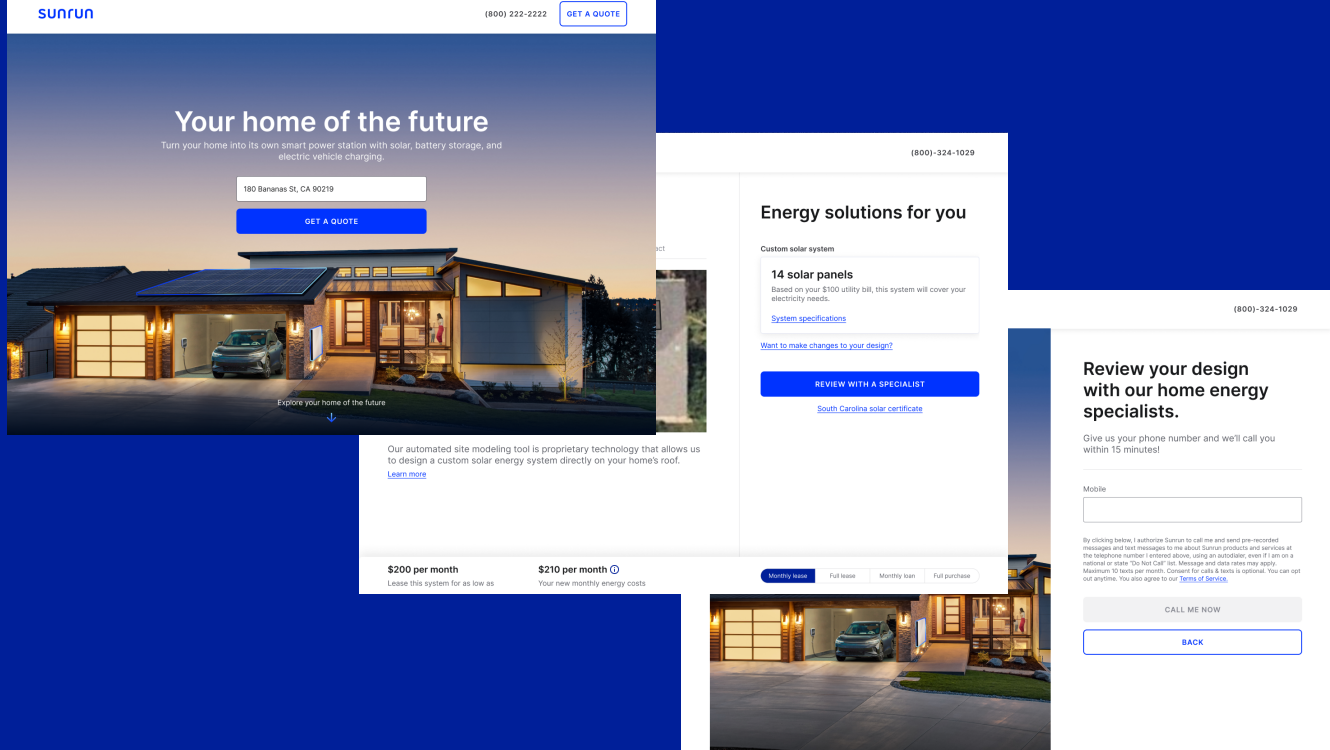






## Solar design deep dive

Navigate through commentary from our design and technical team to find out about how each section came to be, what challenges each section created and how we solve for it.



### Landing page

#### Design decisions

- An immersive and engaging hero image + animation gives users an overview of Sunrun services and how to transform their home.
- Sections below inform the customer about the vision and mission of Sunrun, and why they should trust the company.
- Cost of not going solar communicates the value proposition of going solar, stable bills in contrast with rising utility rates.
- What to expect educates the customer about the solar process.

#### Voice of the user

"I like that it starts with a very simple ask at the very top just enter your address... it gets you into the process right away"

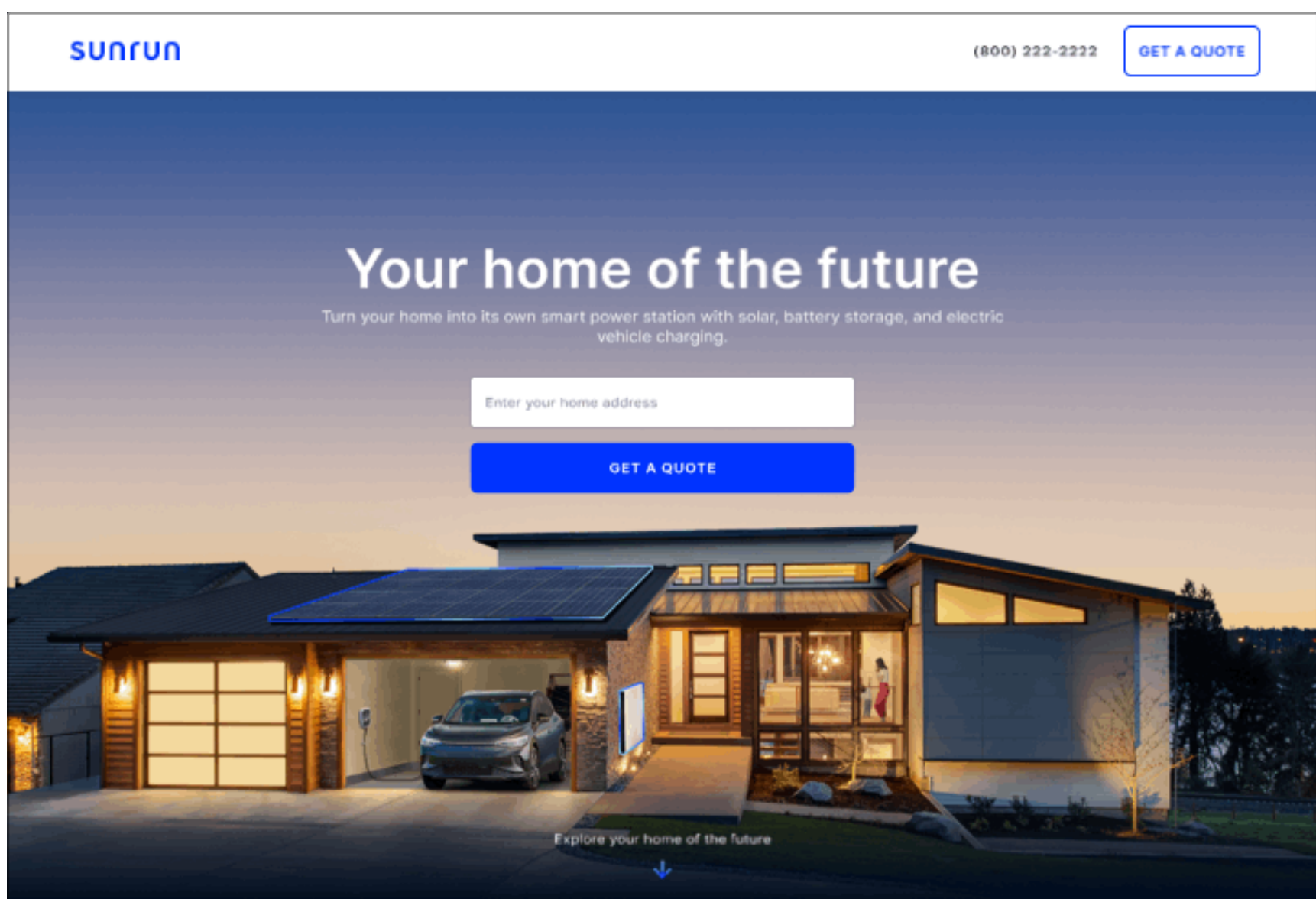
-Ross L., California

"It's giving me a list of tax credits, incentives... Having this information here without me having to search for it is really helpful."

-Sally D., California

"How much would it cost to get it installed? ... those are just some of the things off the top of my head that I would think to ask."

-Anthony J., New Mexico



### Guided interviewing

#### Design decisions

- A simple questioning process qualifies the customer to make sure that they are eligible for solar.
- Customers are asked to provide their email address so that they can receive a link to their quote.
- Questions were determined by what is profitable for the business, and what types of roofs are feasible to put solar panels on.
- Animations and interactions make the experience feel light and smooth.

#### Voice of the user

"I have no problem with that [answering questions], because it's all about getting the correct projected estimate for the project."

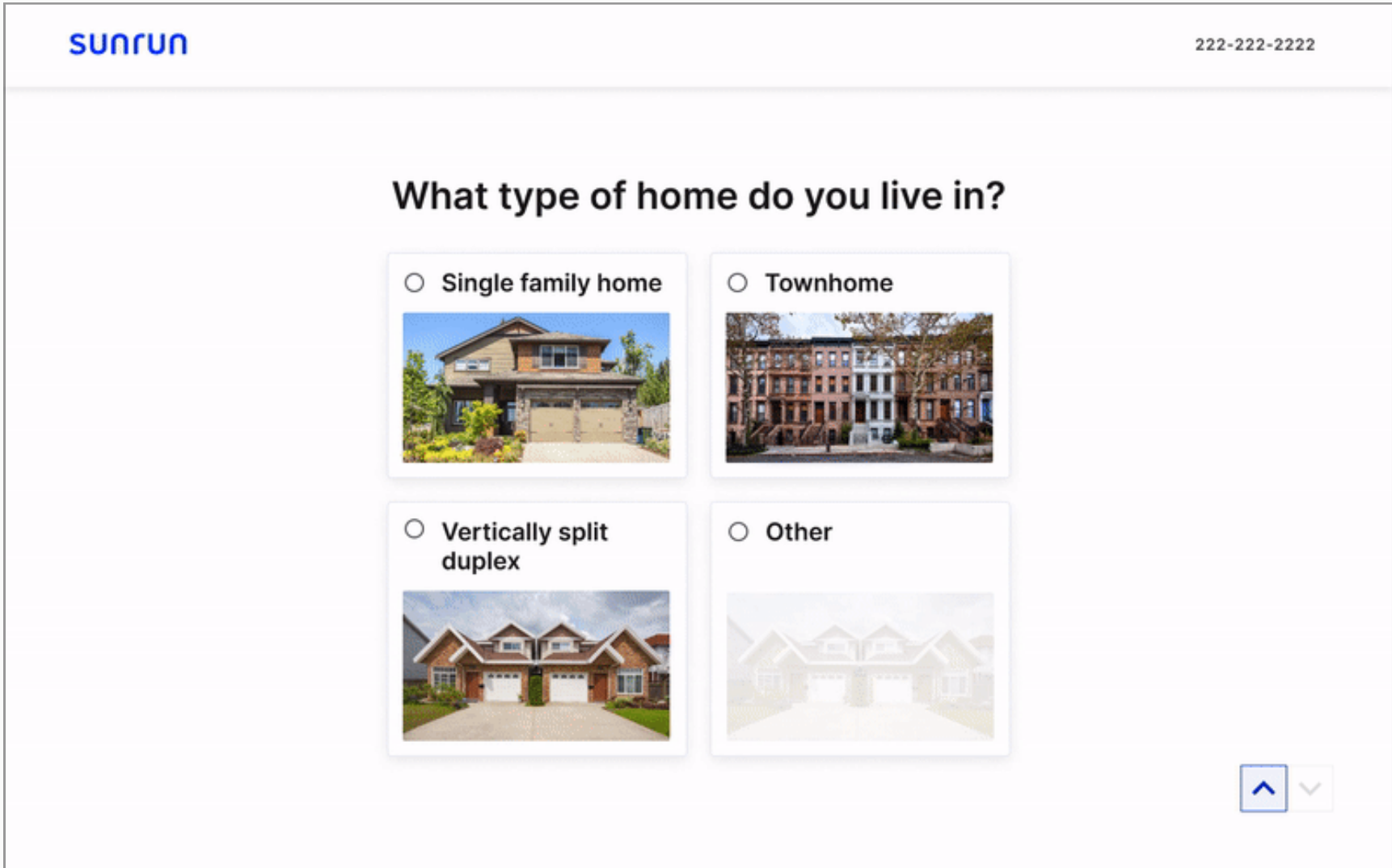
-Aaron M., South Carolina

"I would be ok giving my email but not my phone number just because i don't want a sales person calling me."

-Colleen L., California

"I was just thinking what my roof material is. I think it's composite shingle. Images might be helpful."

-Kristi S., Texas



### Configurator

#### Design decisions

- Users are presented a single solar system placed on their roof, sized for their current electricity consumption.
- A sticky drawer element presents financial options to choose from and showcases the price of the system.
- Complexity and educational content is hidden away behind links to not overwhelm the customer.
- Customers can reach out to a representative if they need help and support.
- This design was validated with development for feasibility. Data points and visuals for this design are coming from an existing database serving salespeople on the ground today.

#### Voice of the user

"I want to get an idea of the savings versus the investment."

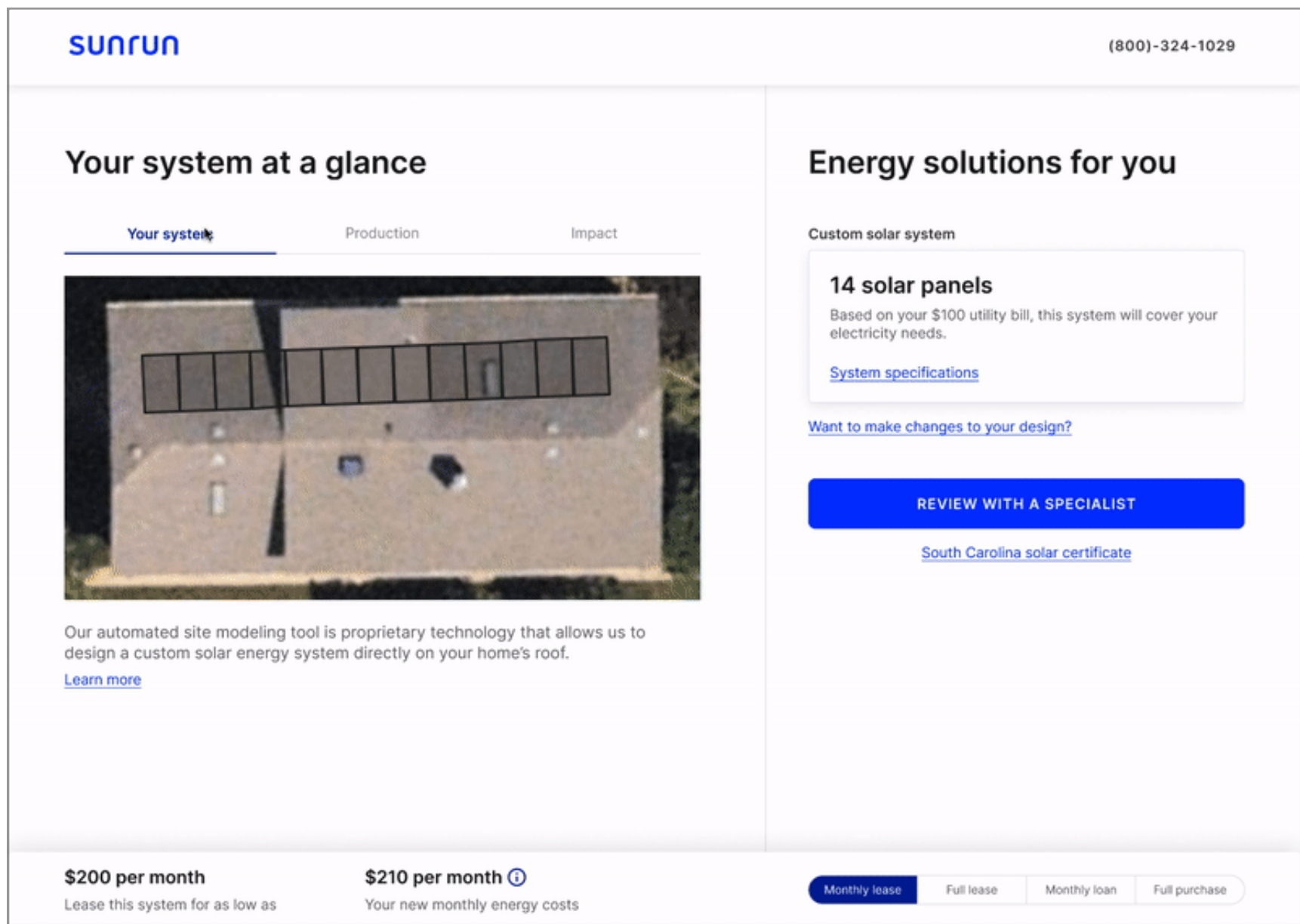
-Jason B., Texas

"It would be super helpful at this point if there's a phone number, and I could talk to an actual live human being."

-Raman M., California

"Also, maybe what's missing is the total cost. It's giving me an estimate for months, but I want to see the bottom line."

-Sally D., California



### Schedule call

#### Design decisions

- Users can enter their phone number to get a call from a Sunrun representative to complete their purchase.
- If the user is accessing the system outside of business hours, they will get a call the following morning.
- Feature to schedule a call in 15 minute increments will be available once the Ford experience launches.
- Afterwards, customers are presented with a thank you message, which outlines the next steps of the process.

#### Voice of the user

"That's exactly what I'd be looking for at this point [referring to the ability to schedule a call with a solar consultant]."

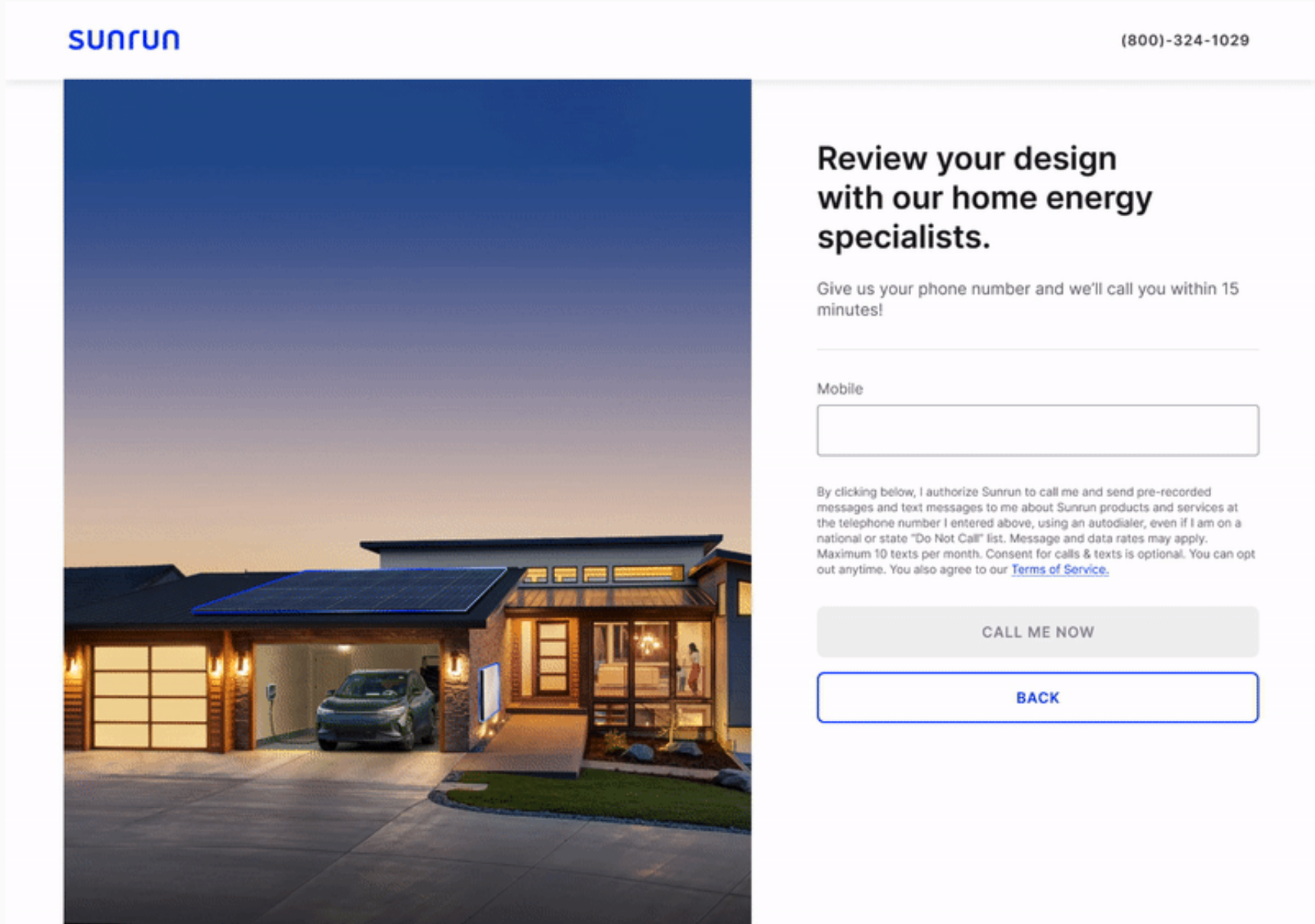
-Anthony J., California

"It's nice letting you know what step 1 and 2 would be. I want to see ... a timeline of how long this whole process from phase one would generally take."

-Colleen L., California

"30minutes tops. Preferably, 15." [referring to the preferred window time for the call]

-Jackie R., South Carolina



## Learn more

### Solution overview

Learn about the solar workstream at a high level.

### Research reports

Read our consolidated research report and view clips of our interviews with prospective customers.

### Solar discovery

Learn about the discovery work that we did to shape the program and the solar workstream.

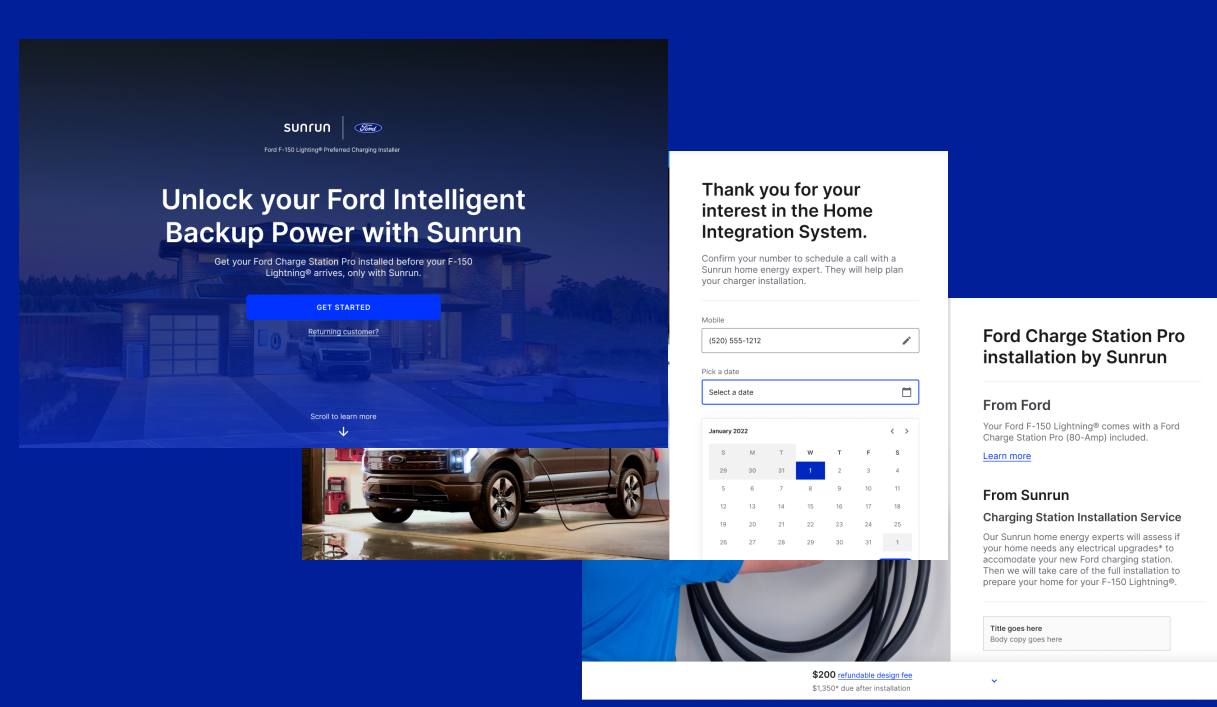


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## Ford Design Deep Dive

Navigate through commentary from our design and technical team to find out about how each section came to live, what challenges each section created and how we solve for it.



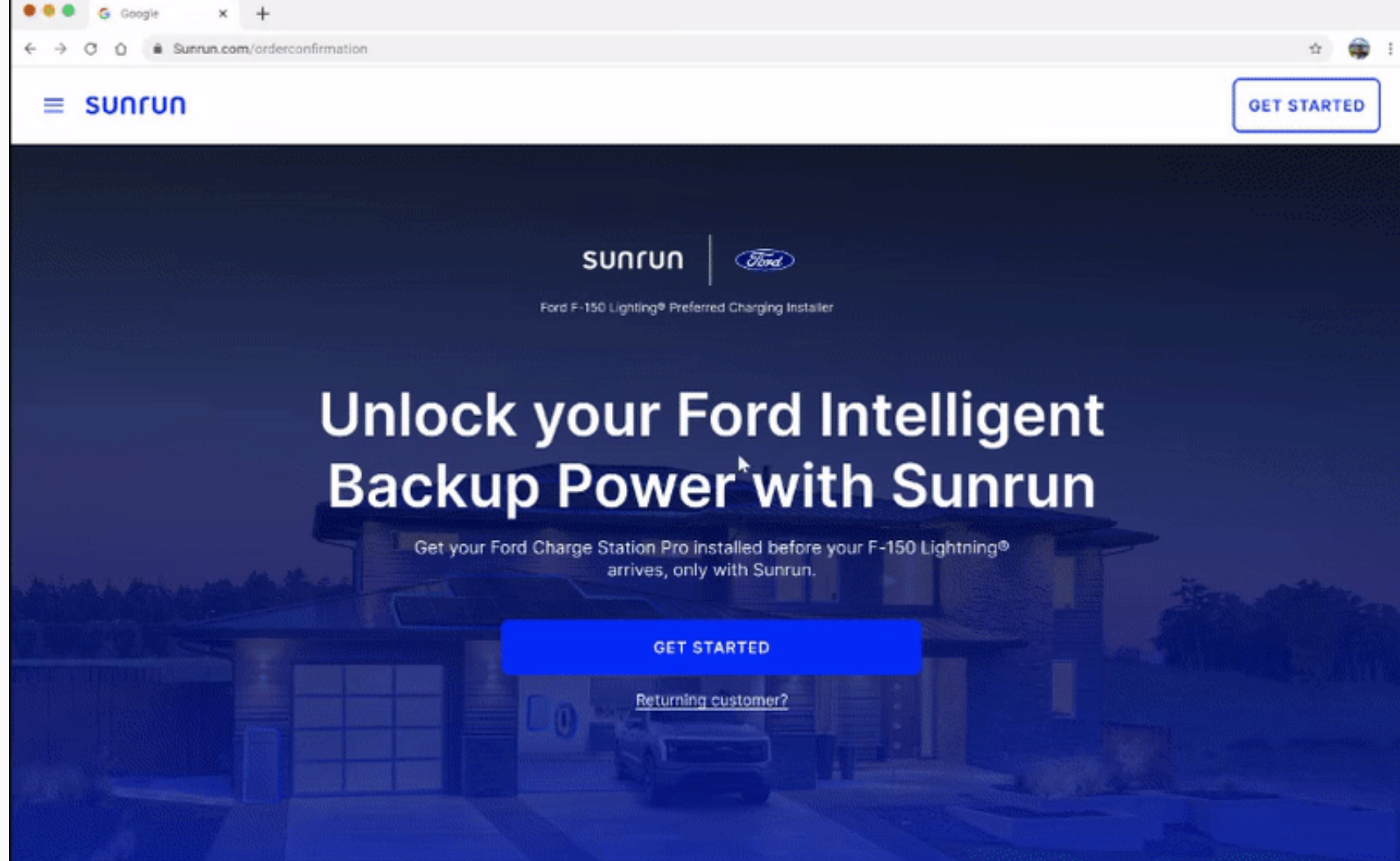
### Landing Page

#### Design decisions

An eye popping hero image that highlights the main selling point introduces the user to the experience while an engaging animation gives users an overview of Sunrun services and how to transform their home.

Sections below inform the customer about the vision and mission of Sunrun, and why they should trust the company.

Finally a frequently ask questions module slides in to answer common questions such as the benefits of solar batteries and future home upgrades implications



Example animation of landing page contents

#### Voice of the user

"I would venture to say that the majority [of my questions] has either been answered or when I hit 'get started' it's going to answer a lot more."

- Aaron M, South Carolina

"It's almost like a lot to read in a way. But, I do appreciate that it is broken up with some images along the way."

-Colleen L, California

"I would probably like more information like on the technology, like what type of equipment is that the company uses?"

- Tim Y, California

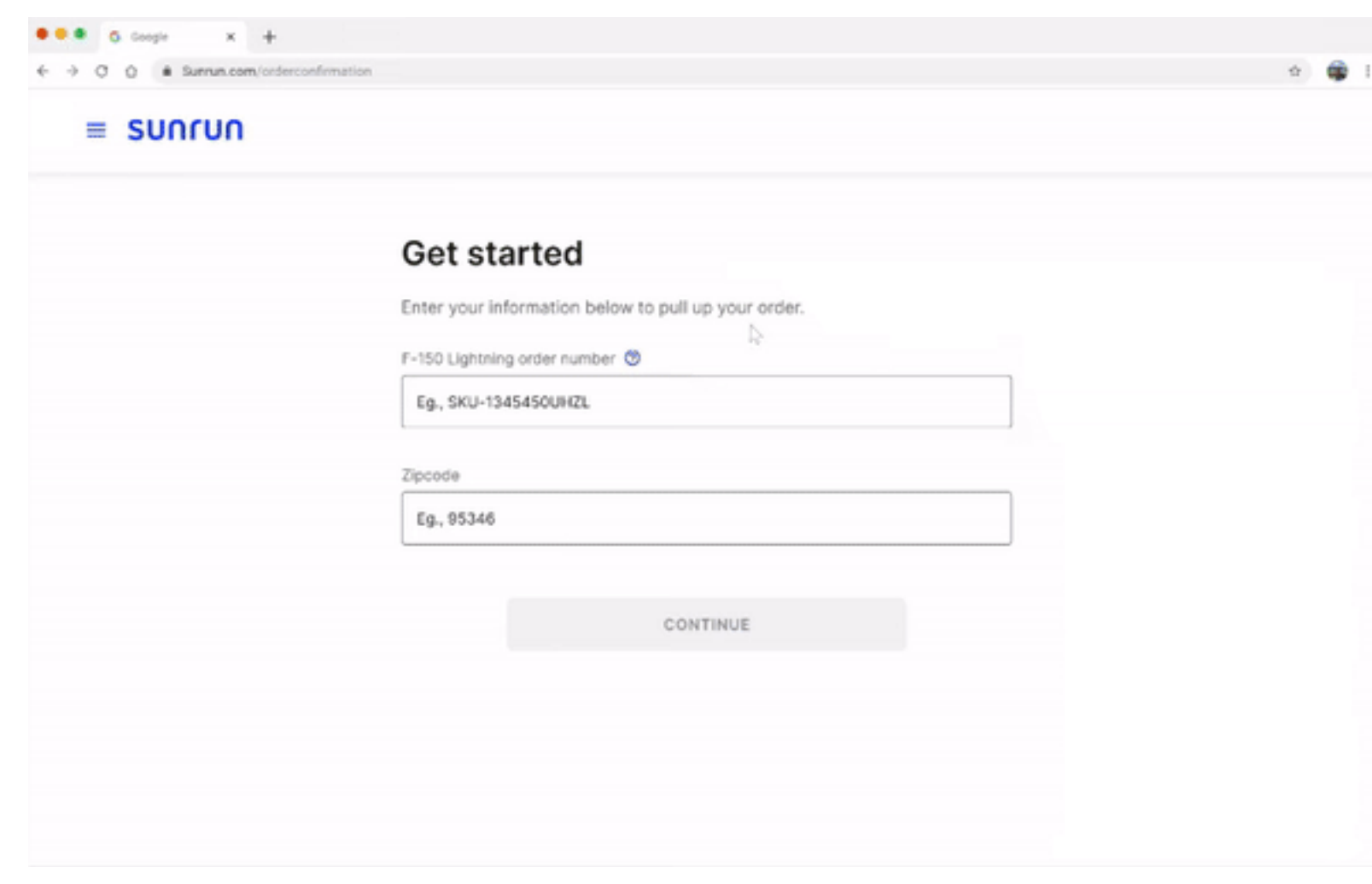
### Order Confirmation

#### Design decisions

A simple questionnaire that asks costumers for their Ford F-150 order number and their zip code to make sure that they are eligible to service.

It's also used to confirm the costumer personal information and homeowner status since it's a requirement for schedule a charger installation with Sunrun.

In case of users that are not eligible for service they are redirected to a referral where they can find a local electrician to pursue their charger installation.



Example animation of order confirmation flow

#### Voice of the user

"It is really easy to navigate, they lay everything out for you."

- Michael Z, California

"I was actually anticipating entering it all myself... but it was already kind of pre-populated for me, which is kind of nice."

- Colleen L, California

"We're kind of curious on the 'enables vehicle-to-home charging with the Sunco power converter. I kind of want to get more information on that and what that means."

-Latisha T, California

### Product Selector

#### Design decisions

Users are presented with a linear decision making process on 3 steps:

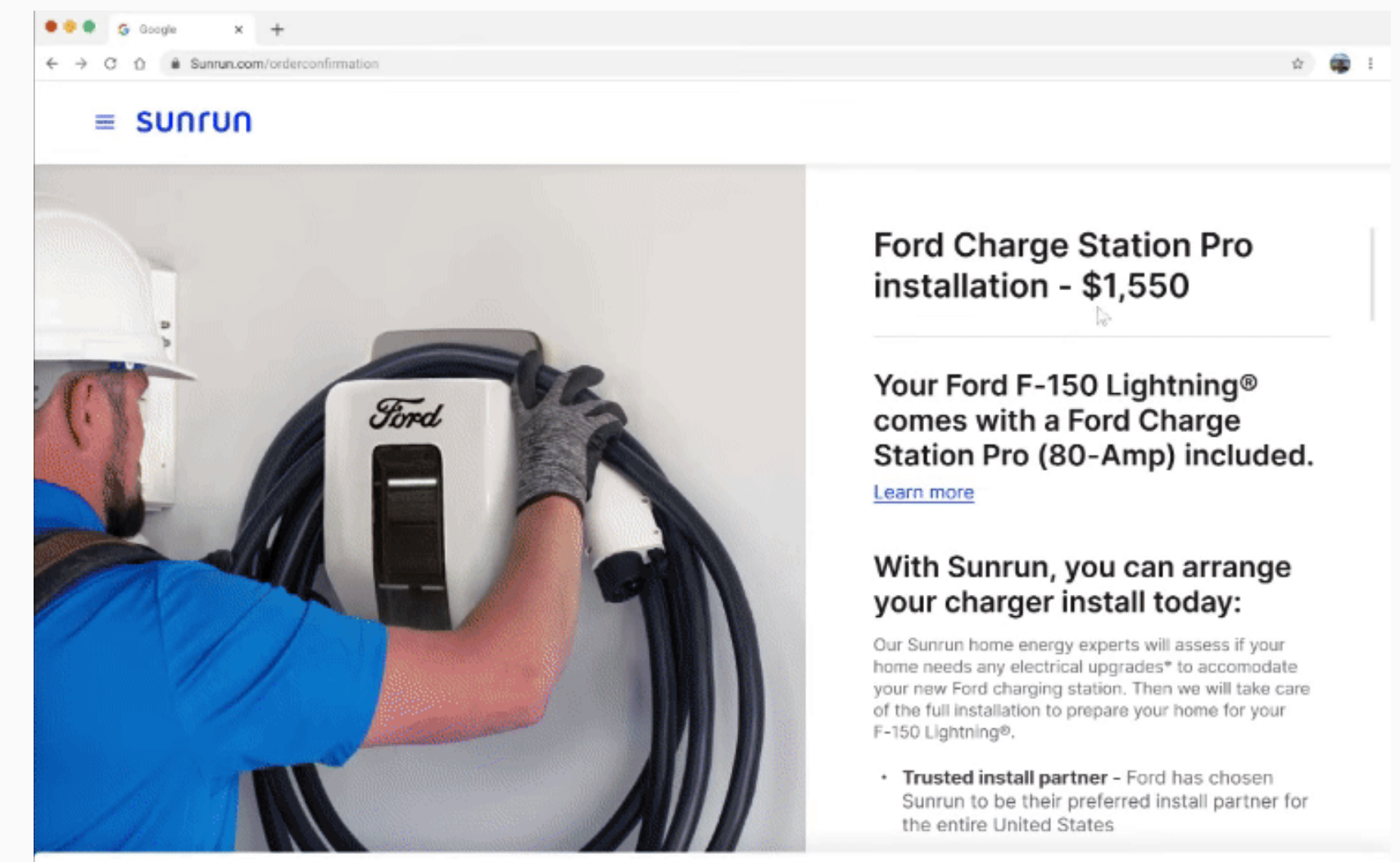
- Introduction** - Summary page where the user adds their charger installation to the services they want to purchase
- Home energy integration system** - Optional purchase of the home integration system, a key piece of hardware needed to unlock the vehicle to home charging capabilities of the Ford F-150 truck
- Home solar consultation** - Optional choice to included solar panels as part of the installation package and reach great benefits as a costumer

Secuencing was key on this part of the experience since the installation service includes products from both companies and it was pretty easy for users to get confused if they were to be exposed to a lot of information in one sit

In addition, to accomodate for essential information, such as pricing, without overwhelming the user with too much information the team propose a expandable "drawer" component.

Said drawer component updates automatically to reflect the users selections throughout the process, an animation is played over the drawer to prompt the user to open it.

Finally depending on the users choices they'll either proceed to checkout or schedule a call with an advisor.



Example animation of product selector flow

#### Voice of the user

"I wonder what kind of steps that they're going to be taking to ensure my home is ready for electric vehicle charger installation." [referring to content in the drawer]

-Jessica M, Georgia

"I want to know exactly what the designing process is like...before I want to, I want to do the refundable design fee."

-Latisha T, California

"I would [be comfortable paying the refundable design fee] because it's refundable... I'd probably look for some little tab with the fine print about what the refund terms are."

-Tim Y, California

### Scheduler

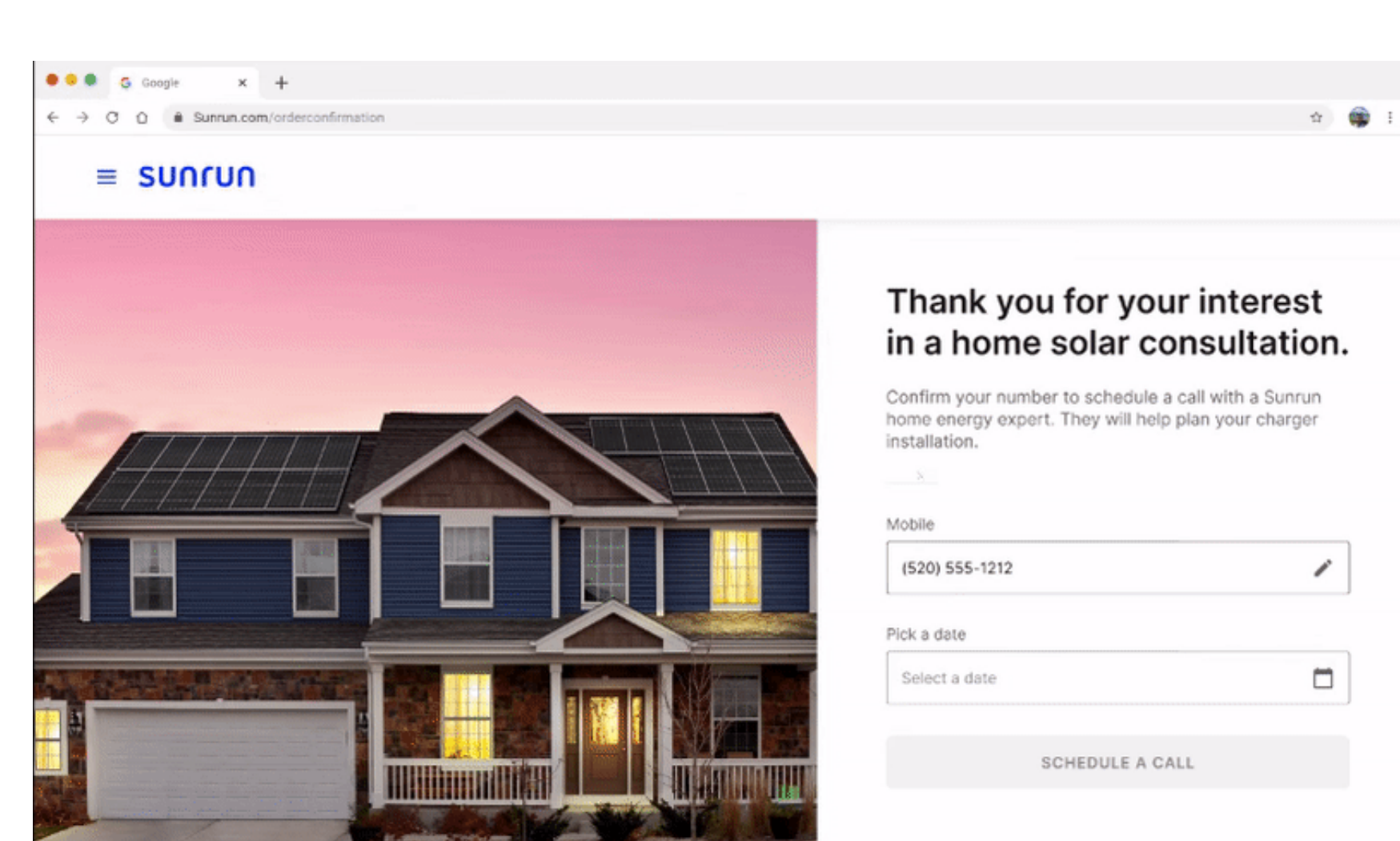
#### Design decisions

Said scheduling module encapsulates the functionality so it has a reusable nature in different parts of the experience

During testing an overwhelming amount of users opted for this option when presented with several choices to establish contact with an advisor. Ease to use and comfort were some of the reasons why this optios was as well recieved

The module lets the user select a date an hour of their convinience and schedule a call in 15 minute increments, this timeframe was implemented thanks to user research that suggested people responded well to 15 minute calls.

Afterwards, customers are presented with a thank you message, which outlines the date they schedule their call and next steps.



Example animation of the scheduler interaction

#### Voice of the user

"It may be a great idea to have another edit box where someone can select time or time duration they can be called."

- Tony H, California

"Im pretty surprised that they have a consultant in 15 minutes. I would like to have an option to schedule an appointment for a more convenient time"

- Tim Y, California

"I would choose to be able to schedule since I would have my calendar with my phone"

-Latisha T, California

### Checkout

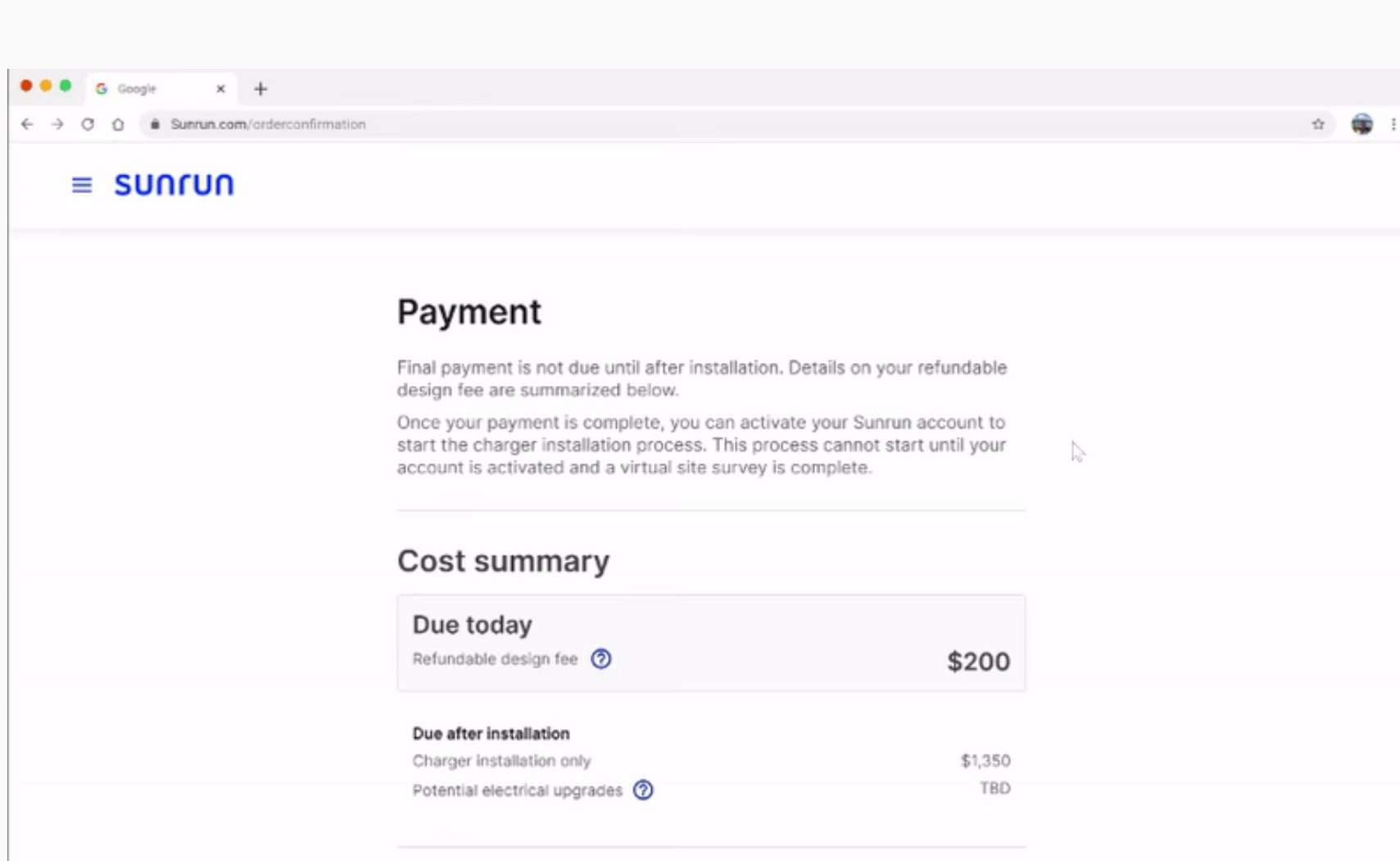
#### Design decisions

Available only to users that selected exclusively with their charger installation.

Here users can enter their payment information and cancel the mandatory refundable design fee.

Costumer can also review their contact information before payment.

After payment is procesed users continue to a virtual site survey where they need to answer several questions regarding their installation preferences and upload certain images of their electrical installation



Example animation of the checkout screen interactions

#### Voice of the user

"Pretty standard. This breakdown of what is due and what is due after is very clear."

- Colleen L, California

"I think it's a understandable amount to get a process going, so I would do it" [complete purchase online]

- Aaron M, South Carolina

"It says Review and Pay and I am thinking wow another step. I thought I would have already paid. It is sort of piece of mind to make sure everything is correct."

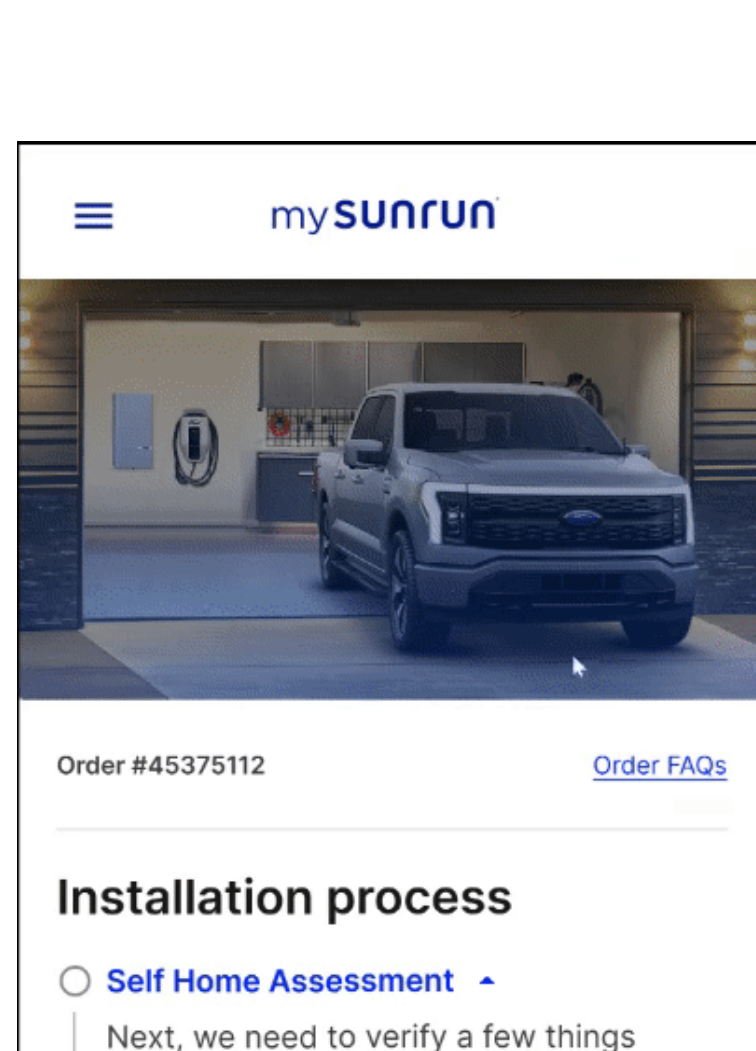
-Jessica M, Georgia

### Post transaction experience

#### Design decisions

After either scheduling or payment, the user must complete certain steps for the installation, for that Sunrun enables a portal to keep track of said steps and sustain communication with costumers

For starters, costumers must complete a digital site survey where, this platform enables the user not only answering questions but also upload pictures of their electrical panels for Sunrun to cjeck an availability whili taking into account costumer preferences



Example animation of digital site survey flow

#### Voice of the user

"I would like to see a little chat box on the bottom right. To just say...hey if you need help filling out this form you can send a chat to someone' and maybe that person on the other line can walk me through."

- Violet V, California

"probably would do it in one sitting because I'm the type of person that once I start something I do want to complete it, but given that this is kind of pretty extensive, there's a lot of information needed, I probably would have to reserve a good time to do it."

- Colleen L V, California

"Oh my God, for every single appliance? That is where you would lose me...because that's 'doing too much' as my kids would say."

- Latisha T, California

## Learn more

### Ford Discovery

Learn about the discovery work that we did to shape the program and the Ford workstream.

### Solution overview

Learn about the Ford workstream at a high level.

### Research reports

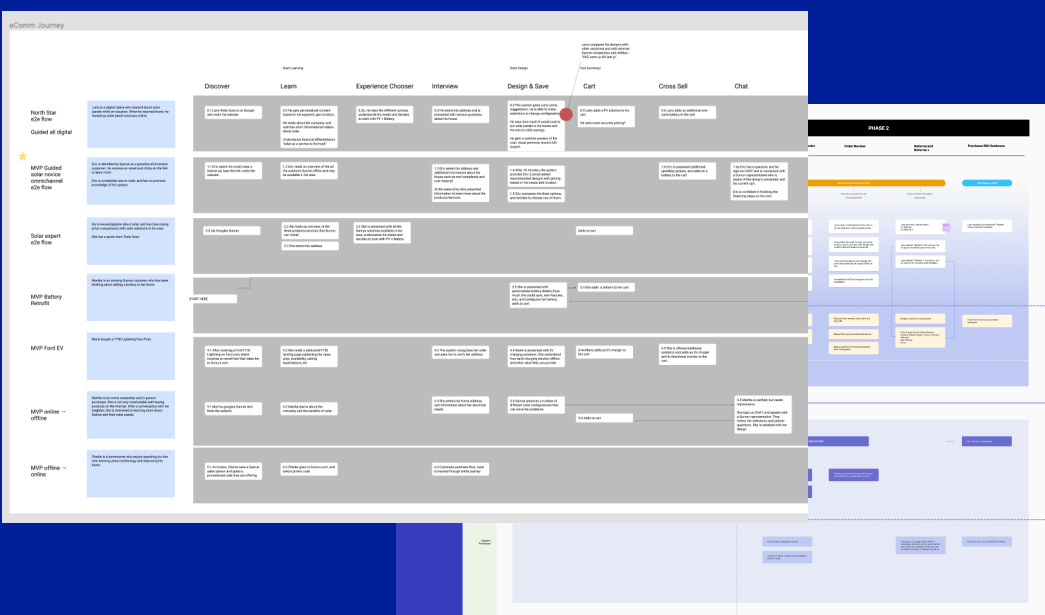
Read our consolidated research report.





# Ford Discovery

Learn about the process we took to build the principles that'll guide our designs decisions



## Stakeholders interviews

Early in the project, we conducted stakeholder interviews to get to know Sunrun and better understand the landscape of home energy solutions.

## Key findings

### 01 Education and service sets Sunrun apart

We heard that education and service is the area in which Sunrun excels. “Educating the customer is a big part of the sales rep’s responsibility.” “Sunrun is not the cheapest option ... We beat out other competitors for financing method and service package bundling.”

### 02 The post transaction experience is an area of opportunity and growth

The post transaction experience is currently an area with a lot of friction. Customers report poor NPS scores due to service they receive from Sunrun after their site survey. It is tough for them to understand what is happening behind the scenes. “PTO (permission to operate) takes 2-3 months. Customers work with a direct project coordinator during this time.” “[We want customers to continue to] look to Sunrun to help them manage the transition to powering their home needs.”

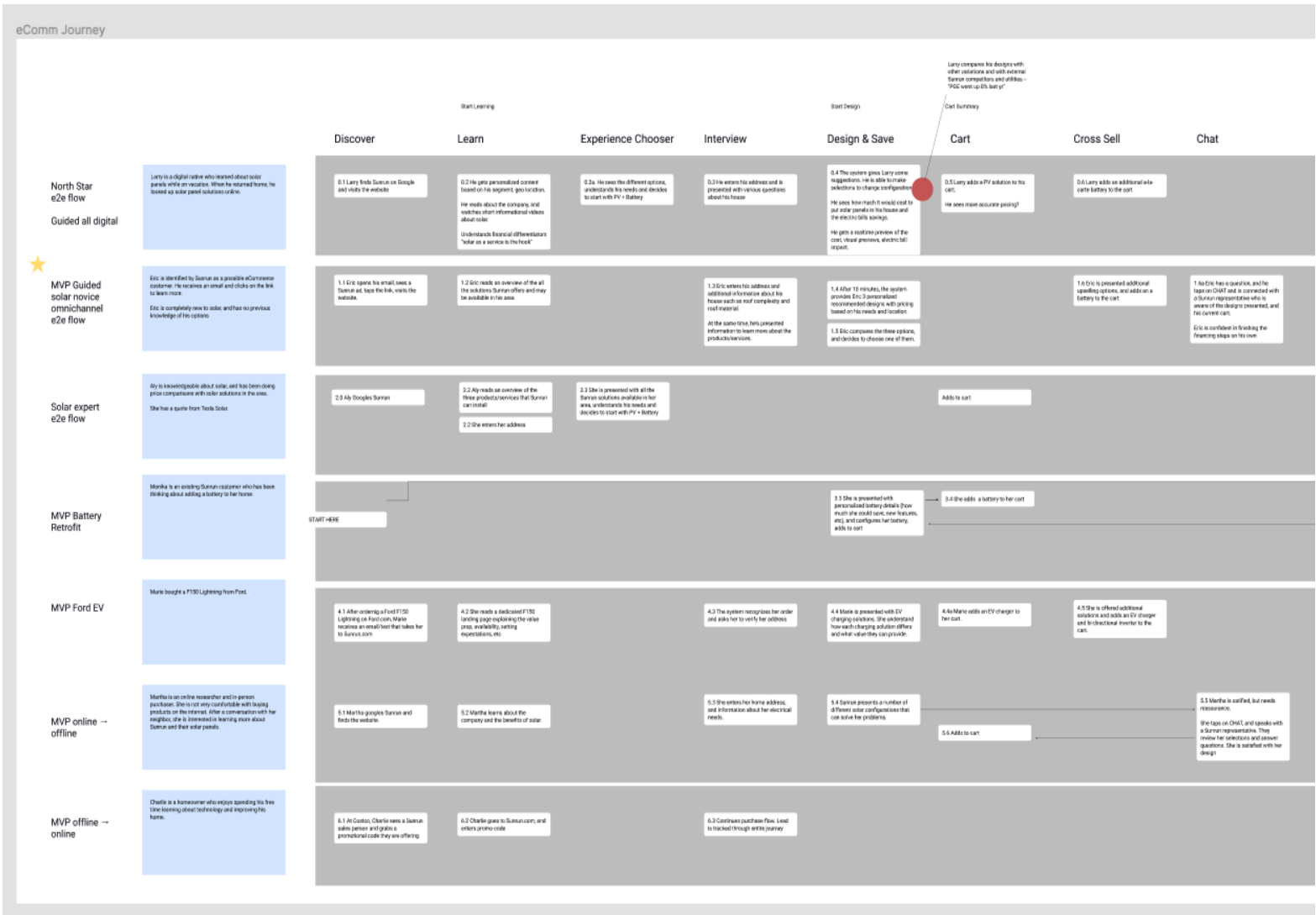
### 03 Communication and flexibility are key to success

At the beggining of the project, Ford was still an unknown that was needed to connect to solar, a lot of questions didn’t have a yer or no answer so our team needed to work really close with the product team and quickly adapt to new decision on the run, as well a constantly communicate with other teams to gather requirements and validate designs

## Customer Journey Map, Sketching, Wireframing

We started sketching various ideas and concepts for what our Electric Vehicle charger installation site experience could look like. After multiple rounds of feedback from our stakeholders, we settled upon a general flow to follow. From there, we began putting together wireframes for development.

On the right, you can see a view of how we evolved from a customer journey to sketches and then finally to wires (which were ultimately transformed into comps and delivered to development).



We went from a rough experience flow

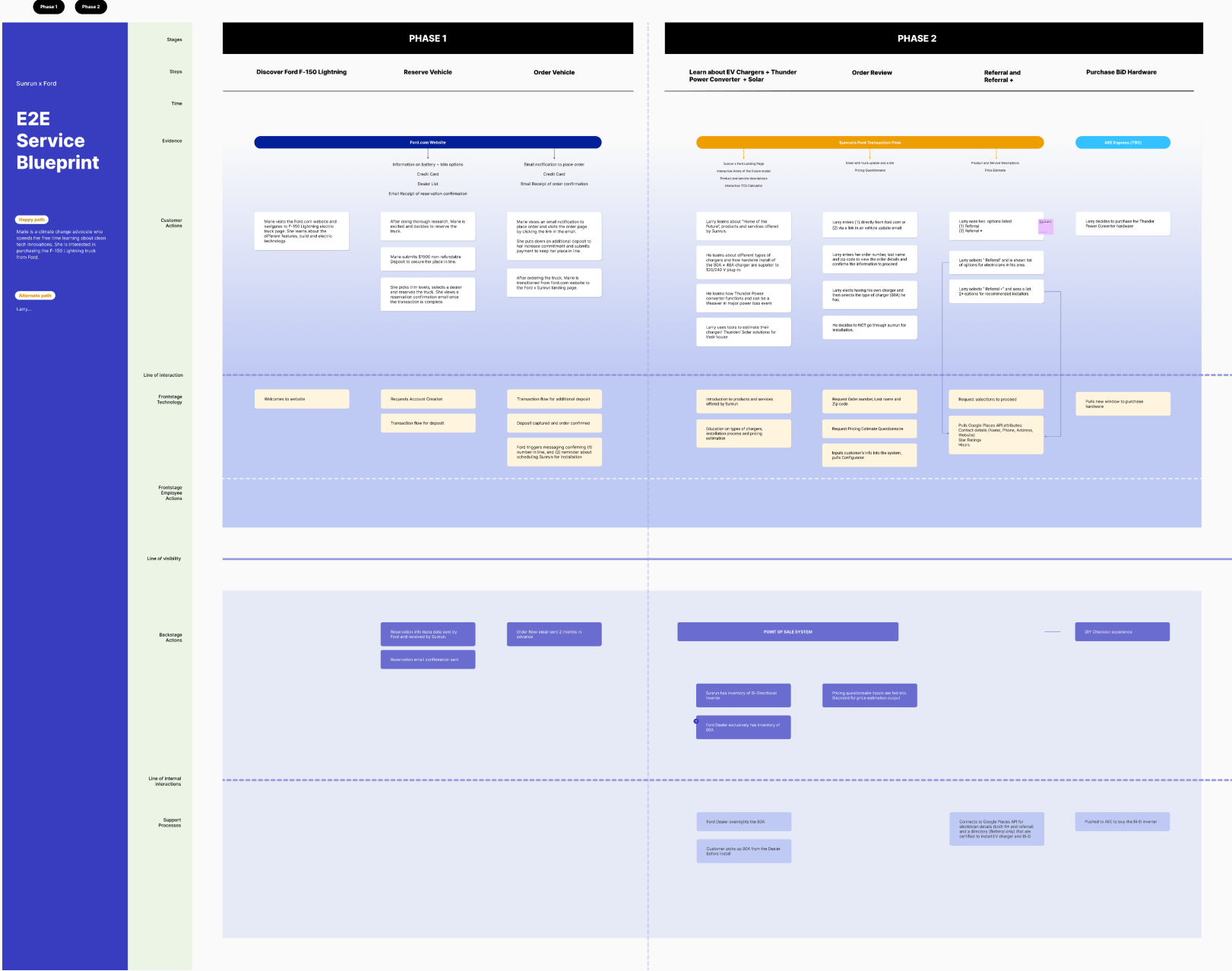


## Service Blueprint

As we built out sections of our experience, we created a service blueprint to help us understand the backend integrations that we had to consider. These ultimately helped us identify requirements and understand what was feasible to build within our tight timeline.

While this blueprint wasn’t a named deliverable, it served as a good exercise for onboarding team members to quickly understand the landscape.

Find a link to our service blueprint [here](#).



Reference image of service blueprint

## Learn more

### Solution overview

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### Research reports

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### Ford design deep dive

Walk through the different sections of our flow in detail to discover why we made certain design decisions.