



Client	KB Home
Project	MyKB Application
Date	May 03, 2016

Research Plan & Protocol

Hunt Statement

Research the daily workflow processes and buying experiences of Sales Counselors and Consumers respectively, across KB regional divisions.

Understand the workflow processes in regional KB divisions and target areas of opportunity from identified pain points, needs, and strengths. These insights inform how to strategically unify and integrate the MyKB platform across regional divisions.

Goals

- Understanding the pre-existing processes within each division tested
- Identify differences between division's processes
- Determining the strengths and shortcomings of operations
- Understanding points of frustration and current needs

Profiles

- Consumers are the primary target users for the MyKB app. They range from individuals interested in KB Homes who sign up for an account (leads), to customers who undergo the entire KB home buying and building experience.
- Sales Counselors are the customer's direct point of contact throughout the Sales process (from initial contact to Move In). They also manage customer communication during the Mortgage, Design and Construction phases of the homebuyer lifecycle.

Recruiting Participants

User Group 1: Sales Counselors (SC)

In order to understand the broad spectrum of customer and sales experiences across KB Home's 17 divisions, we propose recruiting & interviewing 4-6 Sales Counselors across the country using the following rationale:

- Highest & Lowest Earning Divisions: By interviewing the highest and lowest earning divisions, we can identify potential strengths and weakness in current sales



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processes and strategies.

- Longest & Shortest Division History: By interviewing divisions with the longest and shortest KB Home histories, we can better understand what new processes and tools divisions use and how to design for more flexible vs ingrained workflow processes.

User Group 2: Customers

Interview 4-6 Customer participants who have completed the KB home-buying experience using the following rationale:

Recruit participants during meaningful project milestones- individuals who have completed the purchase process at 1 month, 6 months, 18 months, 5+ years. Recruit at least one participant who has filed a warranty claim with Customer Service.



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Research Protocol - Customer

Overview

This interview will focus on defining the current customer experience in the KB home-buying process, as well as defining areas of opportunity for the MyKB application. The researchers (Sasha, Jackie, and Matt) will be conducting interviews both in-person and remotely (through video/phone call) using the guided storytelling methodology.

Research Objectives

- Gain a better understanding of customers' mental models and needs
- Surface pain points in the home buying and maintenance experience
- Observe any difficulties that participants have in communication with KB Home during sales process and identify areas of opportunity for MyKB features

Methodology

Guided Storytelling/Day in the Life

To build rapport with customers, the researchers will have them walk through a typical "day in the life" to establish familiarity with their routines and understand how MyKB would potentially fit into their behavior and practices. We are aiming to learn the customers' vocabulary around specific processes/activities in the home-buying experience so that MyKB can communicate effectively and in their language.



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Script

Introduction

- Expression of gratitude
- Outlining of what we'd like to know, establishing "user as expert"
- Emphasis upon no "wrong" or "right" answers, and all feedback being helpful
- Openness to questions from the user around the wireframes or about the interview process at any time
- Ask for permission to be recorded for internal use only
- Prompt for any questions before beginning

Talk aloud questions

- Can you walk me through your home-buying experience with KB Home?
- In your own words, can you describe the major milestones in your KB Home experience?

1. ATTRACTION

- Can you tell me how you were introduced to KB Home?
- What resources did you find the most helpful in understanding the KB Home process?
- Can you tell me a little bit about how you decided to purchase a KB Home?

2. REGISTRATION (Welcome to KB Home and intro to MyKB; browses community floorplans; set preferences and favorites; sees contact info for sales counselor on MyKB)

- On a scale of 1-5, rate your experience from signing up online to your first contact with a KB Sales Counselor?
- Can you tell me about the factors that contributed to registering for MyKB?
- Can you recall a time where you became frustrated during this process?
 - (If applicable) What would have been a better solution/outcome in this scenario?
- Do you have any recommendations that would have made the registration process more enjoyable/efficient/better for you?



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3. ENGAGEMENT (Creates interactive floorplans, ballpark mortgage eligibility, schedules appt. w sales counselor, visits sales office)

- On a scale of 1-5, rate your experience from the time you were contacted by KB to your decision to visit a KB Home community? How long was this process?
- Did you schedule a meeting with a Sales Counselor and if so, why ?
- Can you describe the communication you received during this period? From KB Home? From your Sales Counselor?
- What information was most helpful and why? What information do you wish you had?
- Did you use the interactive floor plan tool? Can you tell me a bit about using this tool? Was it useful, easy to use?
- Did you use the mortgage calculator? Can you tell me a bit about using this tool? Was it useful, easy to use?
- Did you compare the KB home to other home options and if so, what materials did you use to make your comparison?
- How could this process have been better or more effective?

4. SALE (Takes tour of community, completes mortgage paperwork, makes final floorplan/ community selection, makes appt. w/ design studio, goes to Home Project Dashboard)

- On a scale of 1-5, how would you rate your experience from visiting a KB home community to your decision to buy? How long was this process, how many times did you visit the KB community before making a final floorplan and lot selection?
- Can you tell me about your visit to the KB community? (How did you schedule your appointment, were you given any preparation materials prior to your visit, did your sales counselor set the expectations and how?).
- Can you tell me about a time when you were frustrated during this process? Is there anything that stands out in this period as particularly difficult?
- Do you have any recommendations that would have made this process more enjoyable/efficient/better for you?



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5. FINANCE

- On a scale of 1-5, how would you rate your experience navigating the mortgage process for your KB Home?
- Can you walk us through the process for financing your home? Did you seek financing from an outside lender?
- Did your KB Sales Counselor review financing options with you during your visit to the Sales Office?
- (If applicable) Can you describe your interactions with the Mortgage Counselor? Was it helpful and was his role clear to you?

6. DESIGN (Visits Design studio, makes final design choices)

- On a scale of 1-5, how would you rate your experience during the design phase of your home? How long did this process take? How many times did you visit the Design Studio?
- Can you tell me about your visit to the design studio? (How did you schedule your appointment, were you given any preparation materials prior to visit, did your sales counselor set the expectations for design studio, did you feel prepared for the session?).
- Can you describe any frustrations you had with this process?
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- Do you have any recommendations that would have made this design process more enjoyable/efficient/better for you?

6. CONSTRUCTION (Received on-site visits, visits the site at least 3-4 times, voices questions, concerns about project to the Const. Supervisor)

- On a scale of 1-5, how would you rate your experience during the construction phase? How long did this process take?
- Can you tell me about a time when you were the most frustrated during this process? (If applicable); What better solutions or outcomes you could imagine?
- Can you tell me about a typical interaction with the Construction Supervisor? (How were you introduced, how often did you communicate, etc?)
- How did KB communicate updates on the construction of your home?
- Do you have any recommendations that would have made the construction process more supportive/enjoyable/better for you?



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7. MOVE IN (Walks through home w/ sales counselor, agrees and signs all final Documents, pays for house)

- On a scale of 1-5, how would you rate your experience moving into your KB Home and finalizing your home purchase?
- Can you tell me about a time when you were the most frustrated during this process? (If applicable) What better solutions or outcomes you could imagine?
- Can you tell me how your sales counselor wrapped up the KB Home buying experience?
- Was there any handoff or introduction to the customer service department and can you recount this experience?
- Do you have any recommendations that would have made this move in process more enjoyable/efficient/transparent for you?

8. WARRANTY (Checks in during set periods, Referral, Surveys, Claim Management Services, Anniversary Celebration)

- On a scale of 1-5, how would you rate your experience after purchasing your home?
- Can you tell me about a time when you were the most frustrated during this process? (If applicable) What are the better solutions or outcomes you could imagine?
- Have you had any problems with your home or appliances, and filed for warranty?
- (If applicable) Can you walk me through the process of interacting with customer service and filing a complaint or warranty claim in detail?
- Do you have any recommendations that would have made this process more enjoyable/efficient/better for you?
- Have you referred anyone to your sales counselor or recommended KB Home to anyone? Why?
- Are you aware of any referral programs KB Home offers? How did you learn about them?



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- Do you remember filling out a customer satisfaction survey?

Wrap Up

- In three words what are the most important things that KB Home can provide you during the home-buying process (transparency, customer support, communication, trust, etc.)?
- Is there anything I haven't asked you about during your KB Home experience you would like to add?