CASE STUDY

Fueling customer obsession

Intuit is a global leader in small business and personal financial software, including iconic products like QuickBooks.

Intuit uses Airtable to manage its international design operations across six regions, standardize processes, and – for the first time – quantify their team's performance metrics in customer-centricity, innovation, and efficiency. Their powerful insights database reduced costly repetition of research, decreased lead time for research studies, and encouraged a 'one team' mentality.

The challenge: Unifying global design operations

As a design-driven company that prides itself on putting customers at the center of product development, Intuit built a world-class design practice. However, individual designers used different processes, leading to dangerous siloes, duplication of research, and difficulty measuring the design team's efforts.

Intuit needed a solution to fit their unique needs. According to Patrizia Bertini, International Design Operations Lead, the team evaluated a wide range of tools, searching for "a solution that was flexible enough to actually fit our initial hypotheses, and then change with us."

The solution: A global research insights repository and team scorecards

The team developed an insights database where not only the designers, but also members of many other teams, can easily capture insights during the research process, quickly consolidate all their notes, and seamlessly communicate their findings to the rest of the company.

The system is designed to help reinforce organizational priorities, says Michica Provato, product design manager for QuickBooks in Canada: "We built it so everything ladders to the business priority, down to the session level. We make sure all the sessions ladder to a research initiative or study, and then those studies ladder to input goals, and those bubble up to business priorities."

According to Bertini, with visibility into research operations, they could build scorecards to measure critical success factors for the first time. "It was a matter of: how can we measure teams' efficiency? One of our pillars is customer obsession. But can you prove it? Can you measure it? Can you show me?" says Bertini. "And we had a massive amount of data that actually could help us assess the operations of the teams."

Results: Increased visibility, alignment, and measurability

Global visibility for leadership For the first time, leadership can see everything that is happening across six regional teams, and identify concrete opportunities for improvement.

Improved cross-functional collaboration Because Intuit invites members of all teams to participate in design, Airtable plays a critical role in standardizing and enabling the collaborative research process. "Airtable becomes a platform where it's easy for teams to collaborate, especially cross-functionally," says Bertini. "If you're running a project, you have your marketing and product developers and product managers, working with you. By harmonizing through Airtable, we get all the information in one place. We have visibility into what matters."

Faster research insights By centralizing previous research, Airtable saves the team time and reduces costly duplication of research. Prior to implementing Airtable, "just chasing the existing research could take a week" due to silos between designers, according to Provato. "Airtable has enabled us to go faster."

Better alignment to business outcomes—and more innovation The new system has led to more awareness of key business priorities among designers, and meaningful behavior change. "We see people start asking themselves, 'Am I really customer obsessed or not? 'Is this really an experiment or not?'", says Bertini. "This is increasing our experimentation ratio, which means we increase the quality of what we can shape. We increase the ability to innovate."
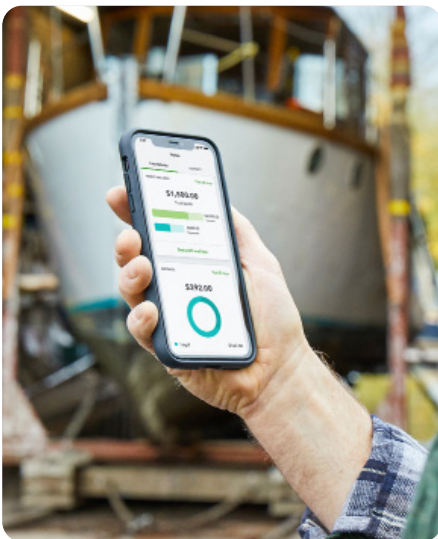
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"Ultimately, it's about customer centricity. You don't evolve or grow as an organization or product if you're not taking all of these inputs. These nuggets are like gems. They're gifts that we get from our customers."
Michica Provato, Product Design Manager, QuickBooks

"What really struck me was the flexibility...We had tried so many other tools before, and although they were great in some aspects, they fell short in other aspects, because they were really rigid. Each company, each organization, has its own way. With other tools, we were trying to adjust our operation to fit the tool, and not the other way around."
Gustavo Machado, International Director of Design

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