Improving the Customer Onboarding & Conversion Flow for PackHive

Scenario Overview

A. Context:

PackHive is a B2B online packaging marketplace enabling SMEs across e-commerce, retail, food & beverage, and manufacturing to source custom packaging from verified suppliers. The platform recently launched a **self-service customization feature** where users can select material, size, design, quantity, and get instant supplier quotes.

B. Business Challenge:

Despite decent traffic (5,000 daily visits), only **30% of users (i.e. 10.5% of visitors) complete the quote flow and place an order**, with **high drop-offs and friction** across multiple stages. The leadership team wants to understand what's causing user churn and how to improve conversions.

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C. Current User Flow

| Packaging Type & Dimensions | → | Artwork Upload or Print Options | → | Supplier Comparison | → | Enter Delivery Details | → | Finalize Order + Payment |

D. Assignment Role:

As a Product Manager, the following are to be investigated:

1. Why users drop off across the onboarding & quote journey
2. How to improve conversion and user experience
3. What success metrics should be tracked

Problem Statement & Hypothesis

A. Problem Statement:

PackHive has a significant drop-off across its user journey. **Only ~10.5% of visitors reach final checkout**, with multiple friction points along the way. The three most critical drop-off zones are:

- High **bounce rate (45%) on the landing page**
- Drop-off at **supplier comparison stage**
- Drop-offs at **checkout/payment stage**

B. User Pain Points:

1. Unclear CTAs and engagement triggers on landing page and start of order flow
2. Lack of real-time pricing & shipping transparency
3. Confusing cost breakdown and fulfilment timeline at checkout
4. Design tool or artwork upload friction

C. Hypotheses:

1. Clearer CTA, better landing & order flow start UX will reduce bounce rate
2. Real-time pricing & shipping data will help users make faster supplier decisions
3. Reducing friction in artwork upload will push more users deeper into the funnel

4. Checkout transparency will improve user confidence and drive conversion

Proposed Improvements

Improvement	Pain-Point Solved	Impact on Business Goals
Landing Page & Flow Start optimization (CTA Clarity)	High bounce rate & early exits	Increase quote entry rate, engagement
Real-Time Pricing & Shipping Transparency with Suggested Suppliers	Drop-offs at supplier comparison	Improved decision-making, reduce churn, increase conversion
Improved Checkout Experience with Updated Cost Breakdown	Drop-offs at payment stage	Increase trust, lower cart abandonment, improve AOV
Artwork Upload Simplification	Friction during design stage	Higher design upload rate, increased customization completion

Click here for Figma Prototype of Checkout Experience

A. User Stories

ID	User Story	Acceptance Criteria
1	*As a potential customer arriving from marketing channels, I want to see a clear CTA like "Customize Your Packaging" on the landing page so that I can begin the order process easily.*	CTA is prominent and redirects user to customization flow; A/B test shows improved click-through rate.
2	*As a potential customer on the customization page, I want to select packaging specifications like material, size, quantity, print surface, and production type to get an estimated price before uploading artwork.*	Dropdowns and inputs are responsive; Estimated pricing dynamically updates based on selections.
2.1	*As a customer selecting print surfaces, I want to view a sample product mock with a placeholder logo to better visualize my packaging.*	Default sample mock with dummy logo renders based on selected surfaces.
2.2	*As a customer configuring my order, I want to see real-time delivery timelines based on delivery type so I can make faster decisions.*	Estimated delivery date auto-updates with change in delivery type or location.
2.3	*As a customer customizing packaging, I want to see real-time price estimates based on quantity and delivery type to compare options before proceeding.*	Price estimate box refreshes within 1 second of any input change.
3	*As a customer ready to finalize customization, I want to upload my artwork so I can personalize the packaging.*	Upload button supports multiple formats (.jpeg, .png, .pdf, .ai); File size limit enforced.
3.1	*As a customer uploading artwork, I want to preview a live 3D view of the design on the packaging to ensure accuracy before checkout.*	Uploaded file overlays accurately on 3D mock with rotation options.

4	*As a customer reviewing suppliers, I want to compare real-time data like product price, shipping cost, delivery time, and supplier ratings to select the best option.*	Each supplier card shows live data; One supplier marked as "Suggested".
5	*As a customer proceeding to checkout, I want to enter my delivery address and review the price summary to finalize the order.*	Delivery form accepts valid address formats; Summary box includes item cost, shipping, taxes.
6	*As a customer making a purchase, I want to enter my preferred payment method so I can complete my transaction securely.*	Form accepts valid card details / UPI; Invalid fields throw error.
7	*As a customer paying for an order, I want to complete my payment via a secure payment gateway to protect my transaction.*	Payment is routed via SSL-secured gateway with success/failure feedback.
8	*As a customer who has completed payment, I want to view an order confirmation with my Order ID, delivery details, and supplier name to ensure my order is placed successfully.*	Confirmation screen loads with full order breakdown and tracking link.

__Click here for Figma Prototype of Checkout Experience__

Solution Outline & Prioritization

Improvement / Feature	Impact (on Conversion, AOV, UX)	Effort (Low, Medium, High)	Priority (P1–P3)	Assumptions / Dependencies	Risks / Mitigation
Landing Page CTA Optimization	High – Clearer CTA will reduce bounce rate and increase quote flow entries	Low	P1	Assumes bounce rate is influenced by unclear CTA and messaging	Risk: Impact may vary by user segment Mitigation: Run A/B test before rollout
Real-Time Pricing & Delivery Estimator	High – Reduces drop-offs at customization and supplier comparison; improves trust and transparency	Medium	P1	Depends on supplier APIs and consistent data feeds	Risk: Data lag or inaccurate pricing Mitigation: Fallback cache, price refresh logic
Simplified Checkout Cost Breakdown (incl. Surcharges)	Medium – Reduces last-step drop-off by improving cost clarity and trust	Medium	P1	Depends on integration of rush-order fees, taxes, shipping aggregation from Supplier API data	Risk: Data mismatch with Supplier API time of checkout Mitigation: Price Lock Logic
Artwork Upload Enhancements + File Guidelines	Medium – Smooth upload improves success rate of design step and reduces support queries	Low	P2	Assumes file format issues are a key reason for support tickets	Risk: Edge case file issues may persist Mitigation: Pre-upload file validation
Supplier Comparison Cards with Rating & Suggested Tag	High – Assists faster decision-making during supplier selection	Medium	P2	Depends on availability of real-time supplier data & scoring algorithm	Risk: Supplier ranking disputes.

					Mitigation: Transparent "Suggested" logic & disclaimer.
3D Product Preview after Artwork Upload	Medium – Enhances customer confidence and reduces post-order dissatisfaction	High	P3	Requires integration of 3D rendering library and artwork mapping	Risk: Heavy dev lift and performance lag. Mitigation: MVP with 2D previews first.

Success Metrics & Data Tracking

Metric / KPI	Quick Description	Why It Matters	How to Track / Collect Data
Landing Page Bounce Rate	% of users who exit without interacting	Measures engagement and landing page clarity	User interaction - Heatmaps (e.g., Hotjar)
Quote Flow Step-wise Drop-Off Rate (Per Step)	% of users exiting at each step of customization flow	Identifies friction points in the quote journey	Funnel tracking - Mixpanel
Design Upload Rate	% of users who successfully upload artwork	Indicates usability and clarity of the artwork upload flow	Product event logs & funnel tracking
Checkout Completion Rate	% of users who reach the final payment step and complete the order	Measures final conversion effectiveness	Checkout logs / Payment gateway analytics
Average Order Value (AOV)	Average monetary value per completed order and supplier	Tracks upsell effectiveness and packaging SKU preferences	Sales transaction database

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Cart Abandonment Rate	% of users who reach checkout but don't complete payment	Highlights last-stage friction or drop-offs	Session drop-off logs / Checkout abandonment reports
User Satisfaction Score (CSAT)	Customer feedback score post-purchase	Captures qualitative user experience insights	Post-order survey (1–5 rating or smiley scale) or NPS Score for initial rollout

Communication & Stakeholder Plan

To ensure smooth rollout and cross-functional alignment, I would initiate structured communication channels with internal teams, starting with a **kick-off sync involving Product, Design, Engineering, Sales, and Customer Success** teams. The goal will be to clearly communicate the rationale for each proposed change, supported by funnel analytics and user research insights.

- **Design team** will be briefed to revamp the landing page and supplier comparison UI based on new CTAs and real-time visibility features.
- **Engineering team** will be guided on implementing API integrations for dynamic pricing, delivery estimates, and artwork upload previews.
- **Sales & Customer Success teams** will be trained to use the updated quote and checkout flow as a new value proposition while supporting onboarding queries effectively.

Externally, a **stakeholder communication plan** targeting **key suppliers and SME users** will have –

- Supplier engagement through one-on-one communication and onboarding documentation to help integrate their **real-time pricing and delivery APIs**, or to provide batch-updated pricing if API access is limited.

- SME customers will receive **clear messaging during the launch (via email campaigns, banners, and tutorials)** highlighting enhanced transparency and simpler order flows.

Final Note

The success of these improvements and the case study relies heavily on proactive communication, cross-functional collaboration, and smooth supplier coordination. By aligning internal teams early, simplifying technical handoffs, and clearly educating users and suppliers, we can drive a frictionless rollout while minimizing confusion and adoption risks.

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