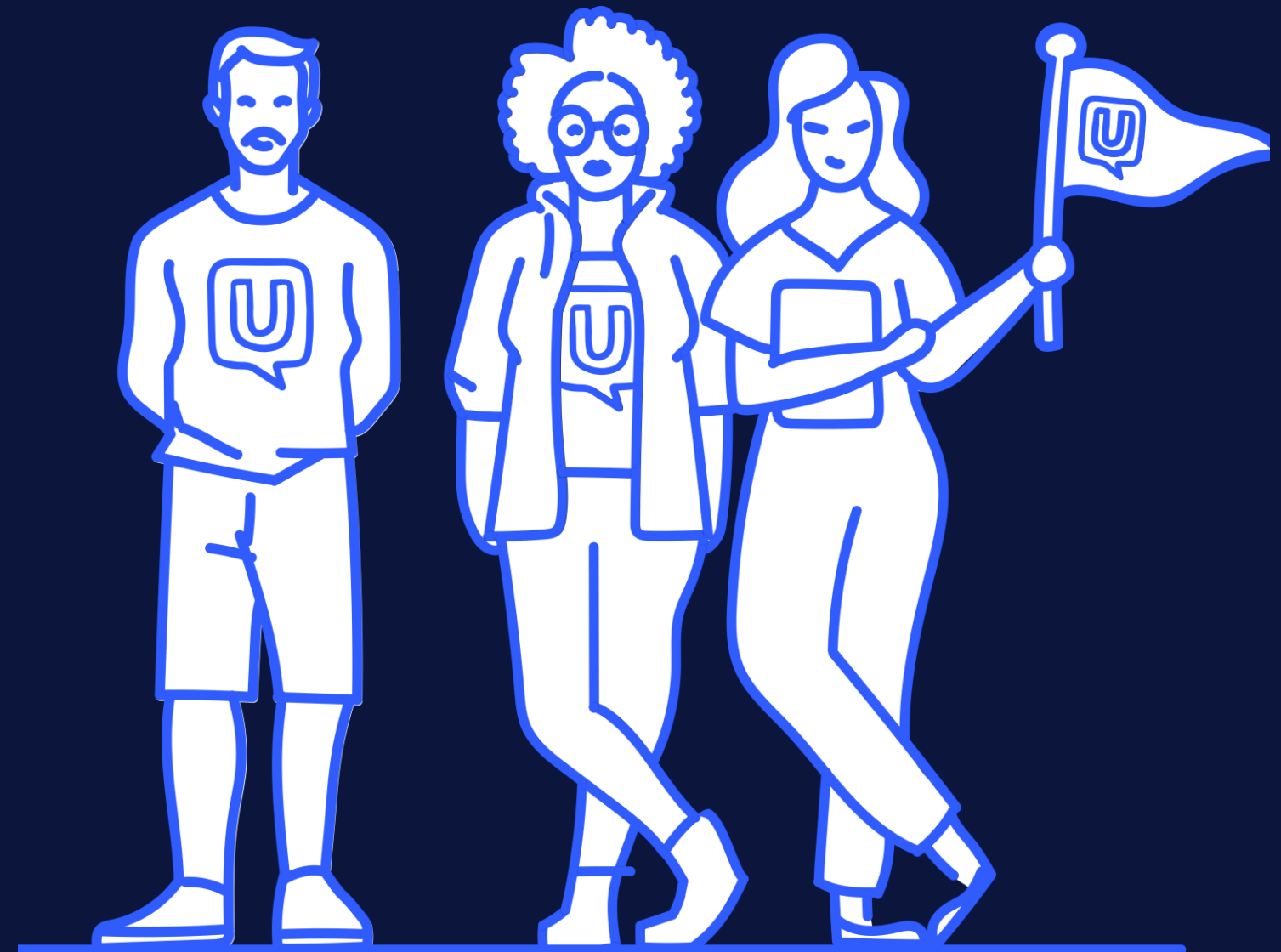


# Innovating Tomorrow

Transforming UX with actionable insights

**Aditi Sharma,**  
Amazon



## Affiliation



**Aditi**

Head of Research and Design,  
**Sharma**  
Amazon

## Positively impacted



JPMORGAN CHASE & Co.



AlixPartners



Accenture  
Interactive



Ministry of Rural Development  
Government of India



United Nations

## Recognition

'40 Under 40'

Business Elite

'Woman Who Builds'

Globant

'Inspirational Women in STEM'

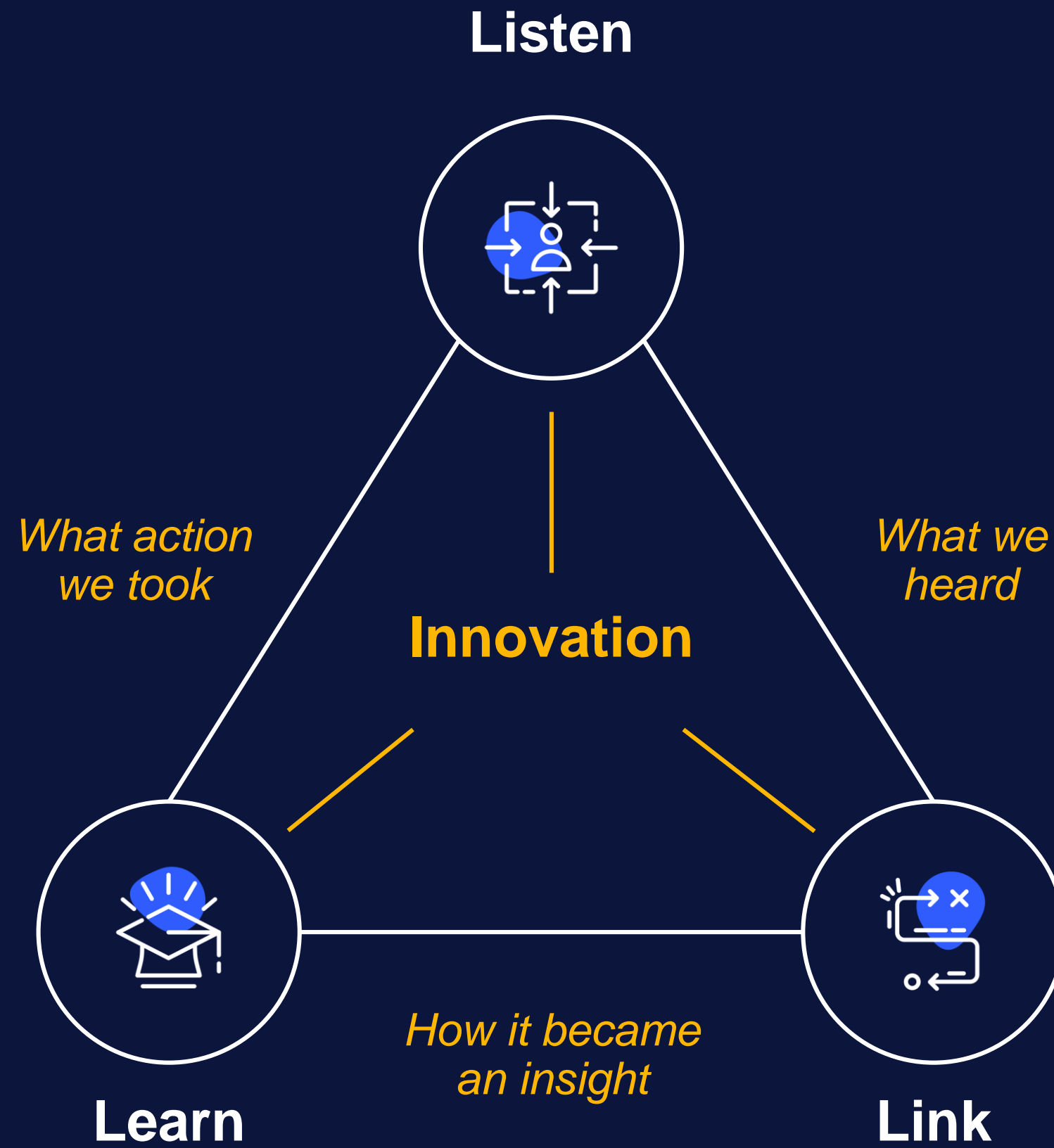
Authority Magazine

'Dr. Sarojini Naidu Award for Tech Innovation'

Govt. of India



# How we innovate<sup>!!!</sup>



## Explore

Digital shadowing,  
Interviews, Surveys

## Experiment

Co-creation workshops,  
Concept testing

## Evaluate

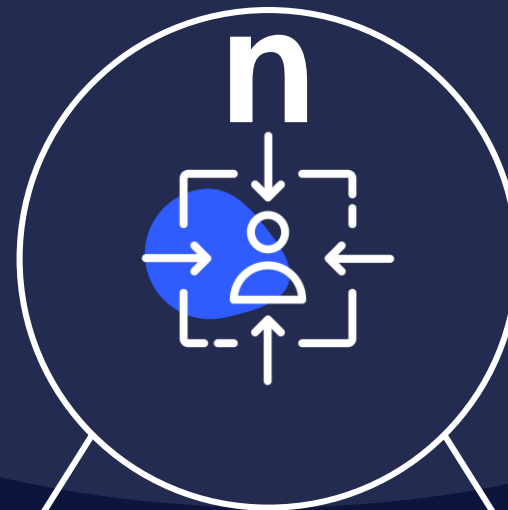
Telemetry, In-app  
feedback, CX scores



How we set goals and outcomes



# Liste





**Link**



## Attitudinal signals

*Increased satisfaction, higher efficiency*



**How we know we're making a difference**



## Behavioral constructs

*Lower cognitive load, better decision making*



## Business impact

*Quality of insights, \$ generated/saved*

## Customer trust

*Data accuracy, Access, Timeliness*

How we measure progress



# Learn

## Experience

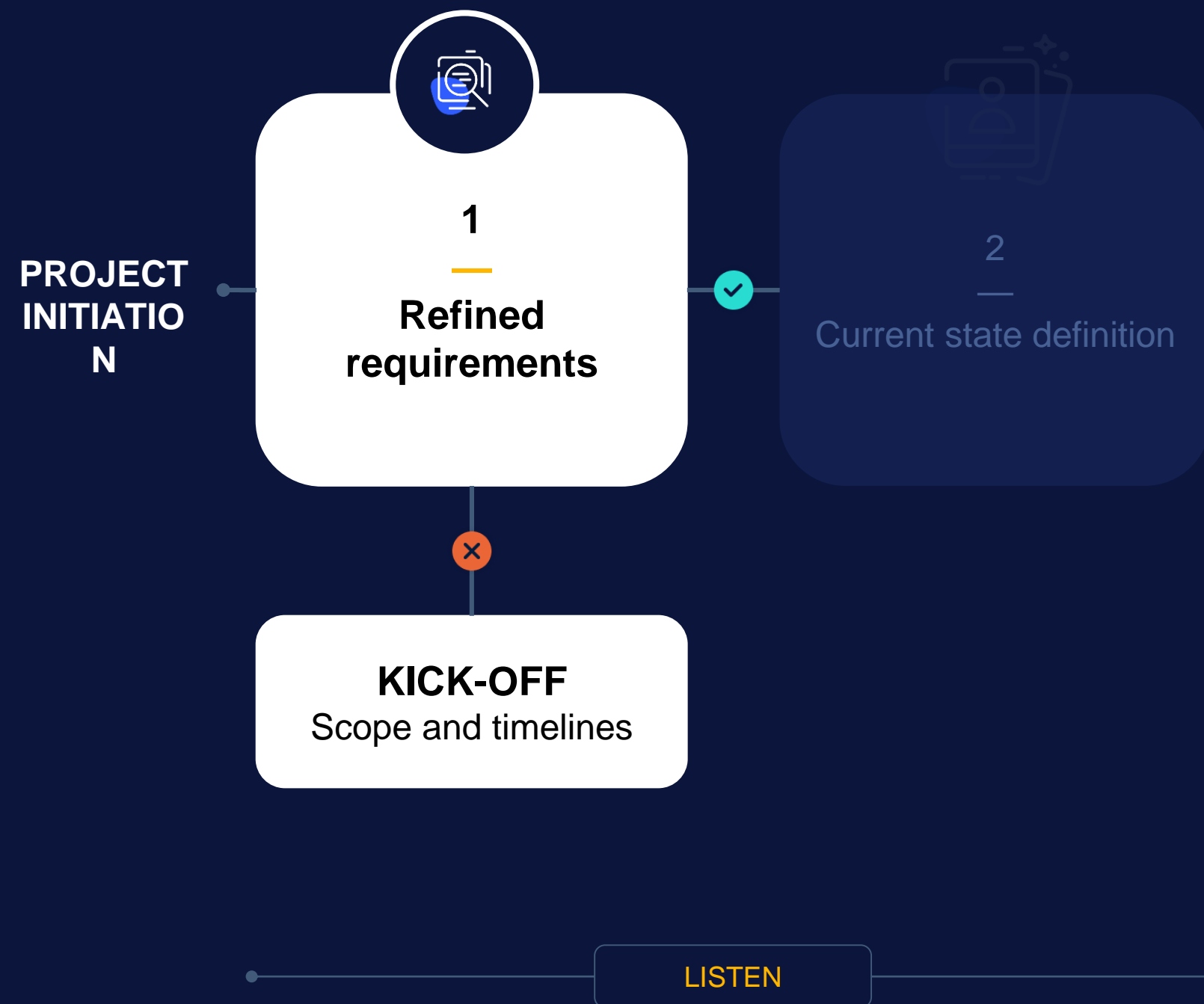
*CSAT, NPS, SUS*

## Adoption

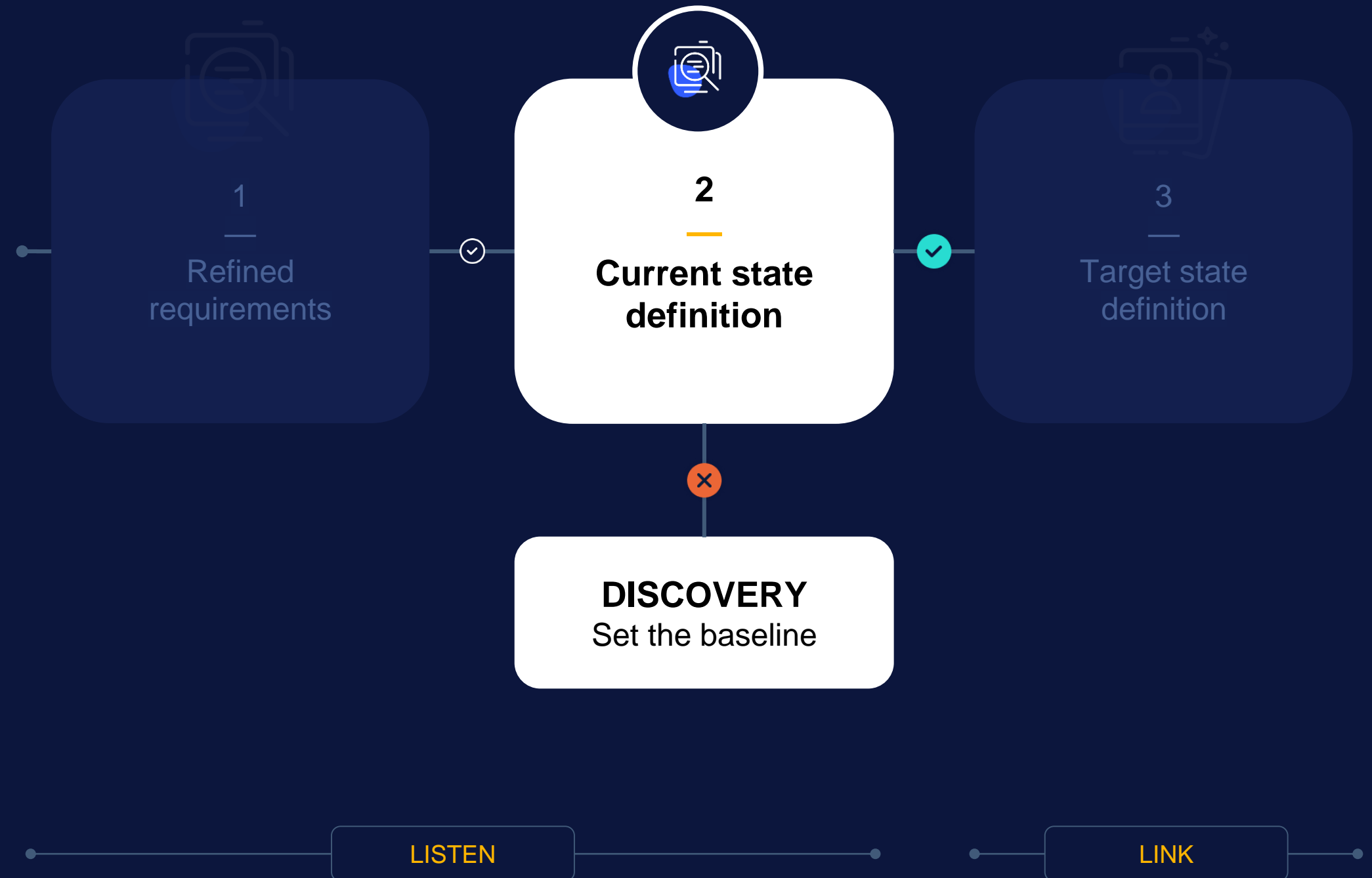
*MAU, DAU, % workflows covered*



# Same framework different results

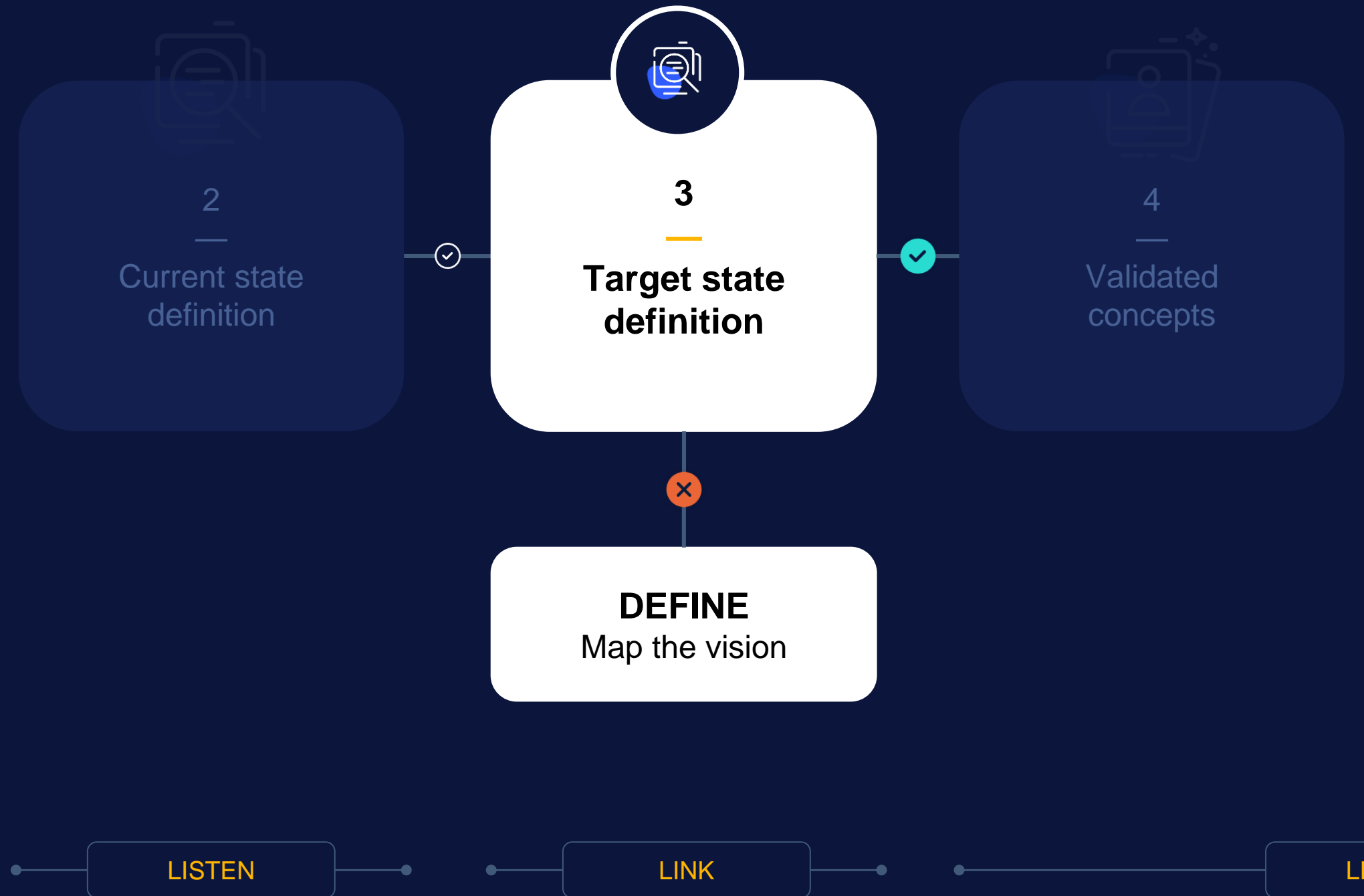


# Same framework different results

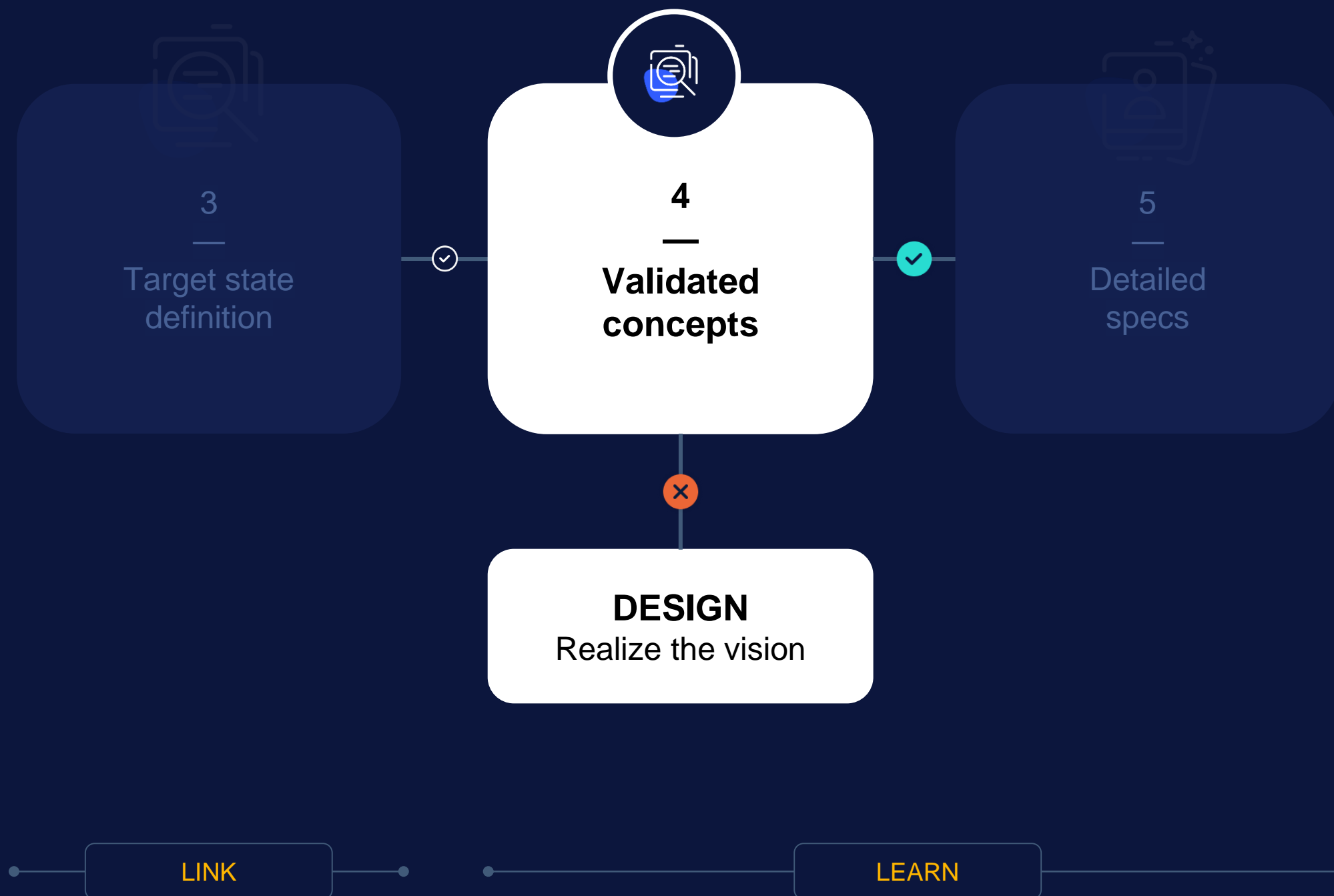




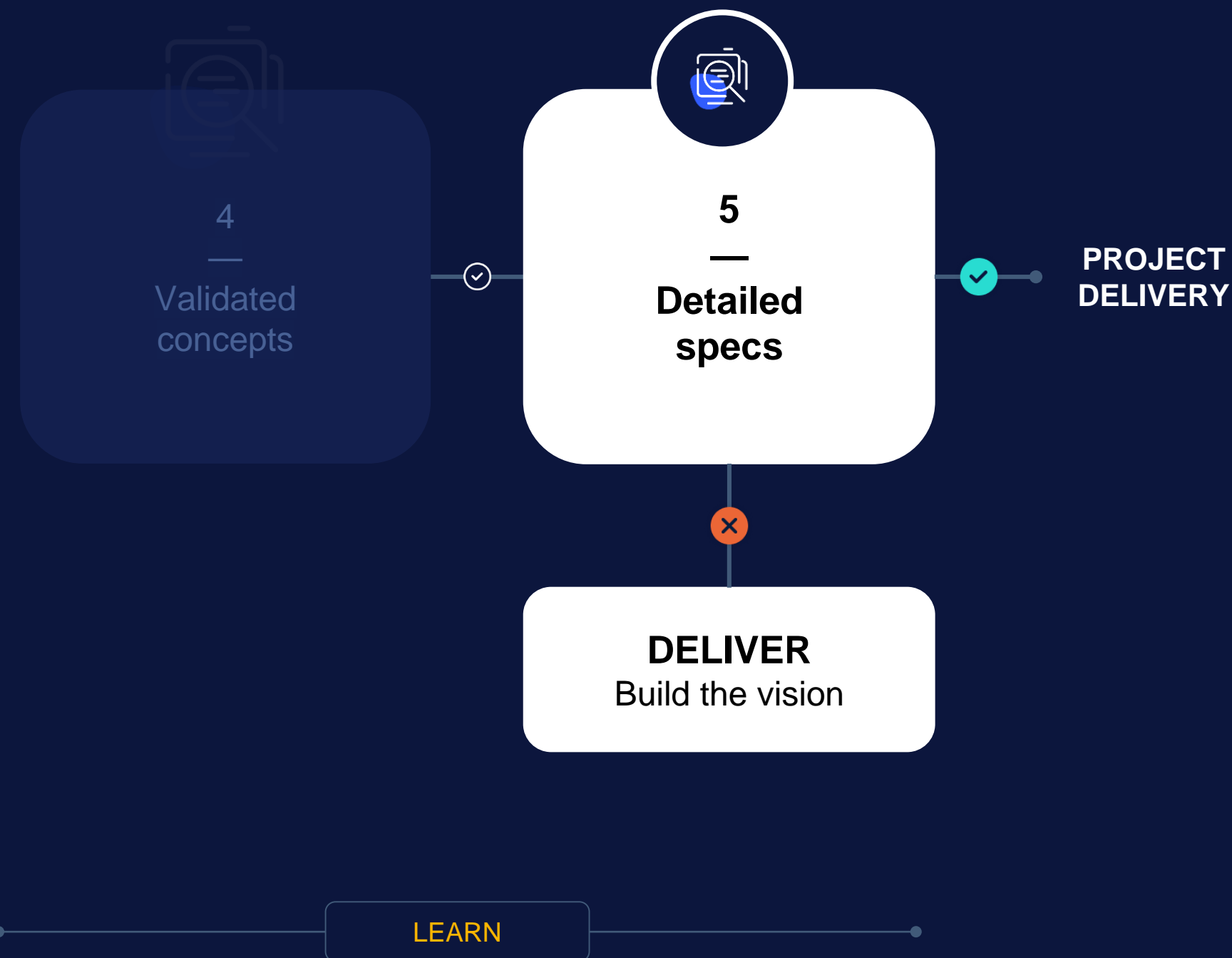
# Same framework different results



# Same framework different results



# Same framework different results



Let's  
see  
innovation in  
action

*Reactive*  
**Fix what's  
broken**

**Enhancing**  
the deal modeling experience  
for the AWS Finance User

**Delight the  
customer**  
*Proactive*

**Creating**  
an ideal experience for  
the AWS Finance User



Reactive

# Fix what's broken

Enhancing the deal modeling  
experience for AWS Finance User



# Client meeting with AWS

*An oversimplified version*

We are looking for a competitive cloud migration proposal for our XX services over the next 2 years.

We will offer you the best rates optimized for your usage and location needs. Let me get back to you.

AWS Sales Team

NETFLIX

aws

NETFLIX



# Behind the scenes at AWS

The numbers look good! I'll get leadership approval and share the contract once it's ready.

**AWS Finance Team**

With their upcoming expansion in A region, we can offer them an additional Y% discount.

**AWS Service Owners**

Team, Netflix needs 1000 EC2 instances, can we offer them a X% for 2 years discount based on their usage.

Great, I'll present it to them!

**AWS Sales Team**

**AWS Global Business Desk**



# Back to the client meeting

That works, we are ready to sign the contract!

Great news! We can offer you the services you've requested at \$ amount at a Z% discount.



AWS Sales Team

NETFLIX

aws

NETFLIX





“ADAPT takes 5-7 times longer to model a custom deal — significantly limiting our ability to prioritize all requests, forcing us to focus only on top-tier opportunities and ultimately leading to lost revenue from missed deals.”

AWS Deal Modeler



# From observation, insight, to delivery

How we reimaged ADAPT UX instead of patch fixing product gaps

12

Sev-2/3 Tickets

31

Users interviewed

Listen

## What we heard

Multiple users from different business groups reported dissatisfaction in working with the AWS deal modeling tool.

13

Workflows mapped

7

Themes identified

Link

## How it became an insight

*We shadowed the users to map their end-to-end journey and frame themes for improvement (unsaid and said needs).*

60%

Effort reduction

33%

Reduction in Time on Task

Learn

## What action we took

*Hosted co-creation workshops with users and iterated to deliver a connected, simplified, and scalable deal modeling tool for AWS.*



Listen

# 3,000+

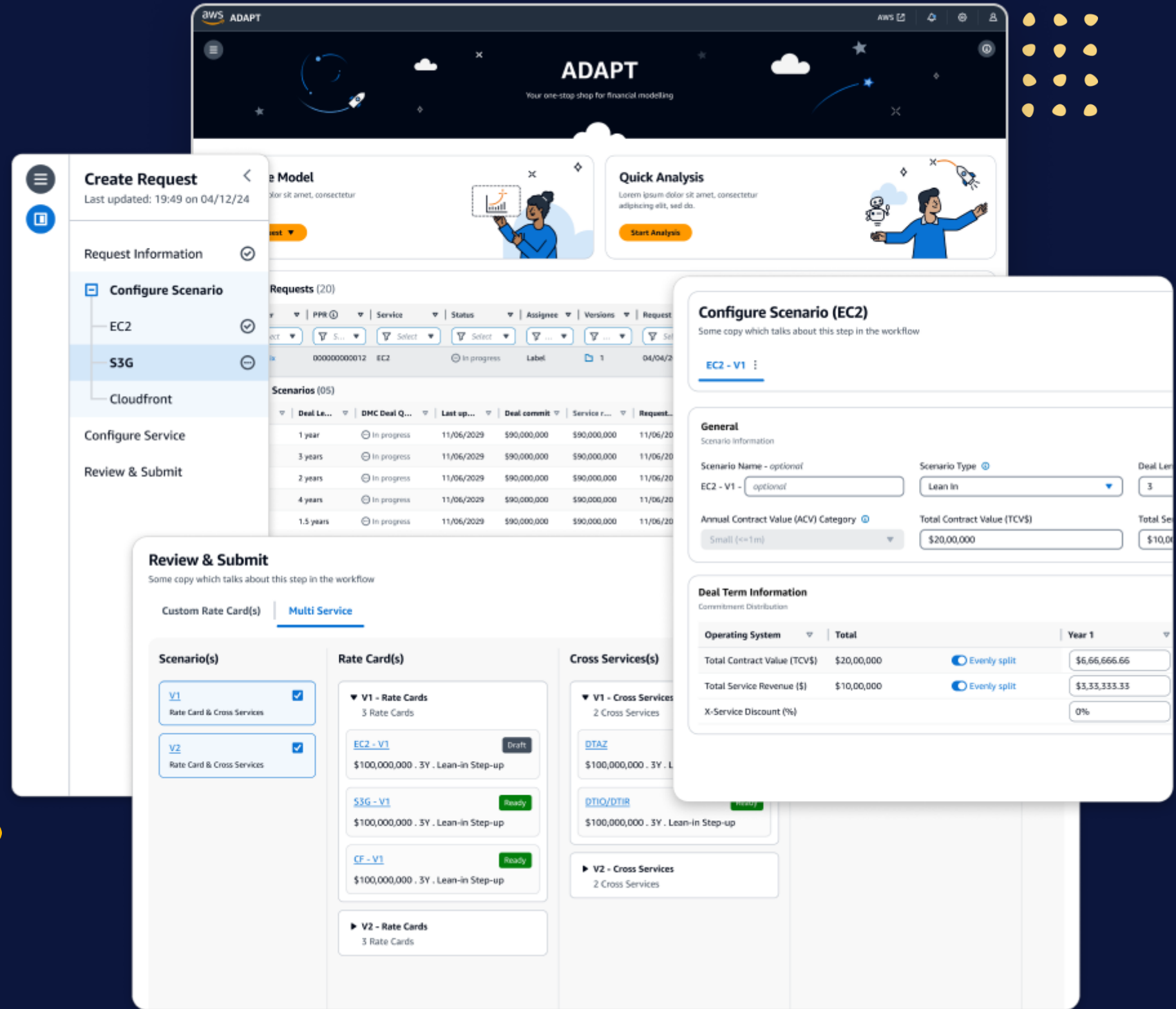
Average number of custom deals modeled using ADAPT (yearly)

# \$20B+

Combined value of deals modeled using ADAPT (yearly)

# 4,500+

Documented hours on deal modeling (yearly)



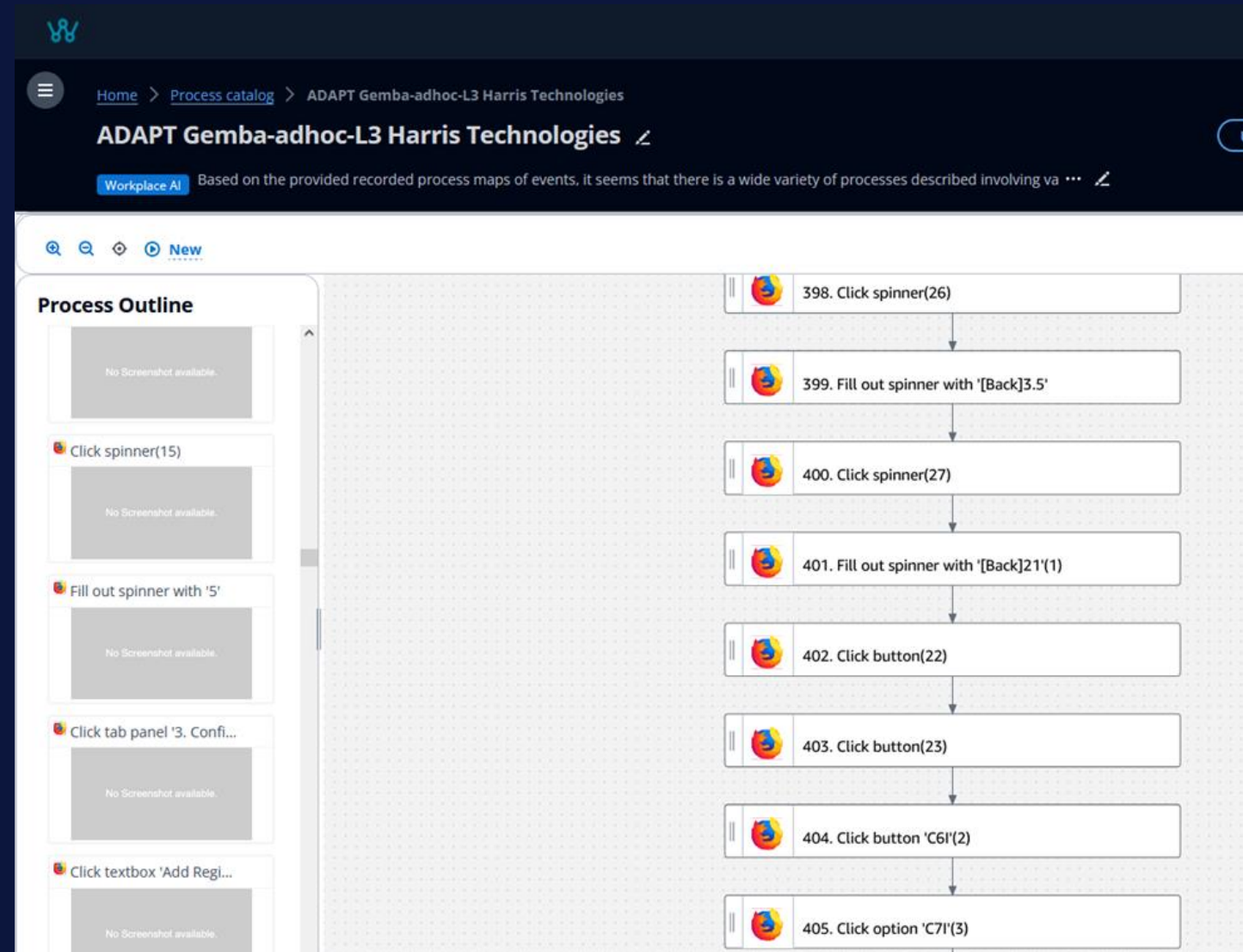
# Click rate and time on task analysis through digital shadowing

1.5 hours

Average time to model a custom deal

10

Users digitally shadowed



Deal inputs | Instance type level

Usage mix

Deal term	Annual contract value (ACV) category	Usage threshold	Purchase option	Operating system	Region	Instance
1	Large	100%	ALL	ALL	ALL	CH
2	Medium	100%	ALL	ALL	ALL	CH
3	Small	100%	ALL	ALL	ALL	CH
4	Small	100%	ALL	ALL	ALL	CH
5	Small	100%	ALL	ALL	ALL	CH
6	Small	100%	ALL	ALL	ALL	CH
7	Small	100%	ALL	ALL	ALL	CH
8	Small	100%	ALL	ALL	ALL	CH
9	Small	100%	ALL	ALL	ALL	CH
10	Small	100%	ALL	ALL	ALL	CH
11	Small	100%	ALL	ALL	ALL	CH
12	Small	100%	ALL	ALL	ALL	CH
13	Small	100%	ALL	ALL	ALL	CH
14	Small	100%	ALL	ALL	ALL	CH
15	Small	100%	ALL	ALL	ALL	CH

**Process Insights**

**Estimated annual time spent info**  
228 hr 18 min

**Average time to complete (ATC)**  
19 hr 1 min

**Annual total execution frequency info**  
12

**Variants**  
0

**Steps**  
803

**Websites**  
0

**Applications**  
5

**Application analysis**

Application	Time spent (% of ATC)	Number of steps (% of total steps)
EXPLORER	~10%	~5%
EXCEL	~5%	~2%
SNIPPINGTOOL	~2%	~1%
WEB	~80%	~85%
OUTLOOK	~3%	~5%

**Top 3 time-cons**  
00:12 Fill out but...



- AWS Sales Team
- AWS Global Business Desk
- AWS Service Finance Team
- AWS Finance Team

Listen

# Pain point mapping

Step 1 — Create request

Step 2 — Configure scenario(s)

Step 3 — Configure service(s)

Step 4 — P&L summary

The sticky-note board contains the following content:

- Step 1 — Create request:**
  - [26:05] Frustration: Tedious process affects productivity, especially when needing to handle multiple deals.
  - [27:17] Concern: Usage mix assumptions might not reflect actual or worst-case scenarios, which affects pricing accuracy.
  - [35:41] Frustration: Unintuitive UI elements and unclear pricing structures create confusion and inefficiency.
  - [38:52] Pain Point: Underrepresentation of certain data could lead to incorrect decision-making.
  - [45:27] Frustration: Interface issues such as [unclear] and [unclear] leading to [unclear] efficiency.
  - [18:10] Frustration: Time-consuming and annoying to correct [unclear].
  - [22:26] Suggestion: Include an export to PDF function for reports to provide better documentation and communication tools.
  - [22:23] Discussion about the complexity of usage and pricing configurations in the system, suggesting a need for more straightforward data management.
  - [34:23] Suggestion: Retaining previous discounts and configurations when duplicating scenarios to maintain continuity and reduce reconfiguration time.
- Step 2 — Configure scenario(s):**
  - [5:38] Issue: The effective date in scenarios must always be in the future, which can cause confusion and errors.
  - [20:25] Problem: Changes in input data can confuse margin calculations, leading to potential errors in financial assessments.
  - [5:40] Issue: Incorrect or unexpected SKU information in the system, leading to confusion over actual customer usage versus system data.
  - [21:27] Overwhelmed: Too much data on the screen making it hard to navigate and focus on what is important.
  - [15:26] Frustration: Current manual deals w automa future ir [unclear].
  - [17:27] Frustration: Details lost when [unclear].
  - [23:15] Pain Point: Needs to adjust pricing for certain products manually, which should be more streamlined in the system.
  - [0:40] Issue: Lack of clarity on the difference between a "request" and a "scenario," and when to create one versus the other.
  - [4:24] Issue: Problem with purchase opt using a proxy must go bac them manually.
  - [6:19] Observation: Most improvement needed in configuring services.
  - [10:48] Pain Point: Current process involves using Excel instead of the intended platform (Adapt), indicating inefficiency in the system.
  - [7:29] Issue: Error message concerning 'instance mix for purchase option must be non-empty' is confusing and not intuitive for users, especially new ones.
  - [3:04] Suggestion: Land on the instance platform page first to avoid unnecessary steps.
  - [2:56] Suggestion: Want to access the instance site page directly without creating first.
  - [4:50] Suggestion: A sandbox environment for playing with scenarios without mandatory fields could be useful.
  - [1:38] Issue: Users experience problems when using the system with Firefox; switches to Chrome for better performance.
  - [39:46] Need: More flexibility in inputting pricing options to reflect customer preferences accurately.
  - [30:04] Pain Point: Historical data is irrelevant for new deal decisions but still clutters the interface.
  - [33:00] Suggestion: Update to pricing conversion logic to ensure accuracy between Adapt and external sources.
  - [43:56] Need: Update to pricing conversion logic to ensure accuracy between Adapt and external sources.
  - [4:50] Suggestion: A sandbox environment for playing with scenarios without mandatory fields could be useful.
  - [39:46] Need: More flexibility in inputting pricing options to reflect customer preferences accurately.
  - [5:02] Suggestion: Ability to bypass certain screens for quicker sensitivity analysis on pricing and margins.
  - [2:15] Observation: Running financial modeling in Chrome affects the performance of other tabs.
  - [0:26] Pain Point: Confusion about why the system prompts to "save and continue" or "continue without saving" when no changes have been made.
  - [4:16] Frustration: Lack of intuitive options for creating scenarios within requests; existing guidance appears inadequate.
  - [3:40] Issue: Refresh the things don't as expected possible iss system resp stability.
  - [12:15] Pain Point: The system should automatically save changes to avoid loss of information.
  - [13:24] Confusion: Unclear about the significance of the evenly split commitment over the years and its impact on the model.
  - [13:38] Confusion: Confusion about percentage calculations and display, affecting understanding of data accuracy.
  - [31:38] Confusion: Confusion about percentage calculations and display, affecting understanding of data accuracy.
  - [19:02] Suggestion: The system should automatically save changes to avoid loss of information.
  - [17:27] Problem: Negative usage values in data, suggesting issues with data quality or system errors.
  - [12:00] Confusion: Different discounts appearing without changes made by the user, highlighting inconsistencies in how discounts are applied or displayed.
  - [4:53] Pain Point: Default settings lead to negativ inapprc size de deal ev [unclear].
- Step 3 — Configure service(s):**
  - [35:49] Frustration: Difficulty in managing discount rates effectively across different scenarios and the need for more intuitive controls.
  - [52:28] Difficulty in managing and understanding cross-service discount applications and pricing overrides, indicating a need for clearer system guidance and functionality.
  - [30:04] Pain Point: Historical data is irrelevant for new deal decisions but still clutters the interface.
  - [33:00] Suggestion: Update to pricing conversion logic to ensure accuracy between Adapt and external sources.
  - [43:56] Need: Update to pricing conversion logic to ensure accuracy between Adapt and external sources.
  - [39:46] Need: More flexibility in inputting pricing options to reflect customer preferences accurately.
  - [5:02] Suggestion: Ability to bypass certain screens for quicker sensitivity analysis on pricing and margins.
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  - [17:27] Problem: Negative usage values in data, suggesting issues with data quality or system errors.
  - [12:00] Confusion: Different discounts appearing without changes made by the user, highlighting inconsistencies in how discounts are applied or displayed.
  - [4:53] Pain Point: Default settings lead to negativ inapprc size de deal ev [unclear].
- Step 4 — P&L summary:**
  - [2:05] Discussion on whether to create new scenarios or requests, suggesting a need for better guidelines and user understanding.
  - [1:23] Question about training for the users highlighting lack of process [unclear].
  - [4:35] Pain Point: Users find it cumbersome to fill in all administration information when it isn't always necessary.
  - [5:17] Confusion: Confusion over why changes in the request settings are immutable and how it affects workflow efficiency.
  - [7:30] Pain Point: Need to non-me alias an tedious [unclear].
  - [34:36] Discussion about the ne for an in-app communication mechanism to facilitate user interactions, reflecting on its potential unpopularity.
  - [1:03] Suggestion: Ensure the system doesn't pull in combinations of settings that don't actually exist to improve accuracy and relevance of data.
  - [20:14] Pain Point: Negative usage figures appear, which is confusing and possibly incorrect.



- AWS Sales Team
- AWS Global Business Desk
- AWS Service Finance Team
- AWS Finance Team

Listen

# Pain point mapping

Step 1 — Create request

Step 2 — Configure scenario(s)

Step 3 — Configure service(s)

Step 4 — P&L summary

The board contains numerous sticky notes with the following content:

- [5:38] Issue:** The effective date in scenarios must always be in the future, which can cause confusion and errors.
- [35:49] Frustration:** Difficulty in managing discount rates effectively across different scenarios and the need for more granular controls.
- [1:38] Issue:** Users experience problems when using the system with Firefox; switches to Chrome for better performance.
- [30:04] Pain Point:** Historical data is irrelevant for new deal decisions but still clutters the interface.
- [33:00] Suggestion:** Sir, include update to pricing conversion logic to ensure accuracy between Adapt and external sources.
- [43:56] Need:** Update to pricing conversion logic to ensure accuracy between Adapt and external sources.
- [26:05] Frustration:** Tedious process affects productivity, especially when needing to handle multiple deals.
- [27:17] Concern:** Usage mix assumptions might not reflect actual or worst-case scenarios, which affects pricing.
- [2:56] Suggestion:** Want to access the instance site page without creating first.
- [3:04] Suggestion:** Land on the instance platform page first to avoid unnecessary steps.
- [4:50] Suggestion:** A sidebar for... with... controls.
- [5:02] Suggestion:** Ability to bypass certain screens for quicker sensitivity analysis on pricing and margins.
- [1:23] Question:** Question about... for the users... highlighting lack of process...
- [34:36] Discussion:** Discussion about the need for an in-app communication mechanism to facilitate user interactions, reflecting on its potential unpopularity.
- [31:38] Confusion:** Confusion about percentage calculations and display, affecting understanding of data accuracy.
- [1:03] Suggestion:** Ensure the system doesn't pull in combinations of settings that don't actually exist to improve accuracy and relevance of data.
- [17:27] Problem:** Negative usage values in data, suggesting issues with data quality or system errors.
- [15:26] Frustration:** Current manual deals with automation in the future.
- [17:27] Frustration:** Details lost when... Needs to adjust pricing for certain products manually, which should be more streamlined in the system.
- [4:53] Pain Point:** Default settings lead to negative inappreciable size deal events.
- [12:00] Confusion:** Different discounts appearing without changes made by the user, highlighting inconsistencies in how discounts are applied or displayed.
- [0:40] Issue:** Lack of clarity on difference between "request" and "action" and when to create versus the other.
- [7:29] Issue:** Error message concerning "instance mix for purchase option must be non-empty" confusing and unusable.
- [4:24] Issue:** Error message concerning "instance mix for purchase option must be non-empty" confusing and unusable.
- [4:16] Frustration:** Lack of intuitive options for creating scenarios without saving.
- [3:40] Issue:** Refreshing... without saving.
- [2:15] Observation:** Running... modeling affects... of other...
- [31:38] Confusion:** Confusion about percentage calculations and display, affecting understanding of data accuracy.
- [13:24] Confusion:** Confusion about the... of the evenly...
- [7:31] Suggestion:** Ensure the system doesn't pull in combinations of settings that don't actually exist to improve accuracy and relevance of data.
- [17:27] Problem:** Negative usage values in data, suggesting issues with data quality or system errors.
- [10:48] Pain Point:** Current process involves using Excel instead of the intended platform (Adapt), indicating inefficiency in the system.
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- [4:53] Pain Point:** Default settings lead to negative inappreciable size deal events.
- [12:00] Confusion:** Different discounts appearing without changes made by the user, highlighting inconsistencies in how discounts are applied or displayed.

**Counterintuitive processes**  
causing confusion and frustration (~5m)

**Limited input capabilities**  
leading to inefficient data entry (~1m)

**Repetitive data entry from multiple systems**  
leading to inefficiencies & potential errors (~5m 30s)

**Lack of value-added features**  
(e.g., suggestions, validation, comparison)

**Confusing information display**  
hindering intuitive navigation & task completion (~30s)

**Sluggish system performance**  
causing delays and frustration (~2m)

**Rigid adherence to predetermined workflows**  
limiting flexibility and efficiency (~2m)

**Discrepancies in data across systems**  
leading to inconsistencies (~3m)

**Poor state management**  
often resulting in duplicated effort (~2x effort)



# Uncovering insights

[Link](#)

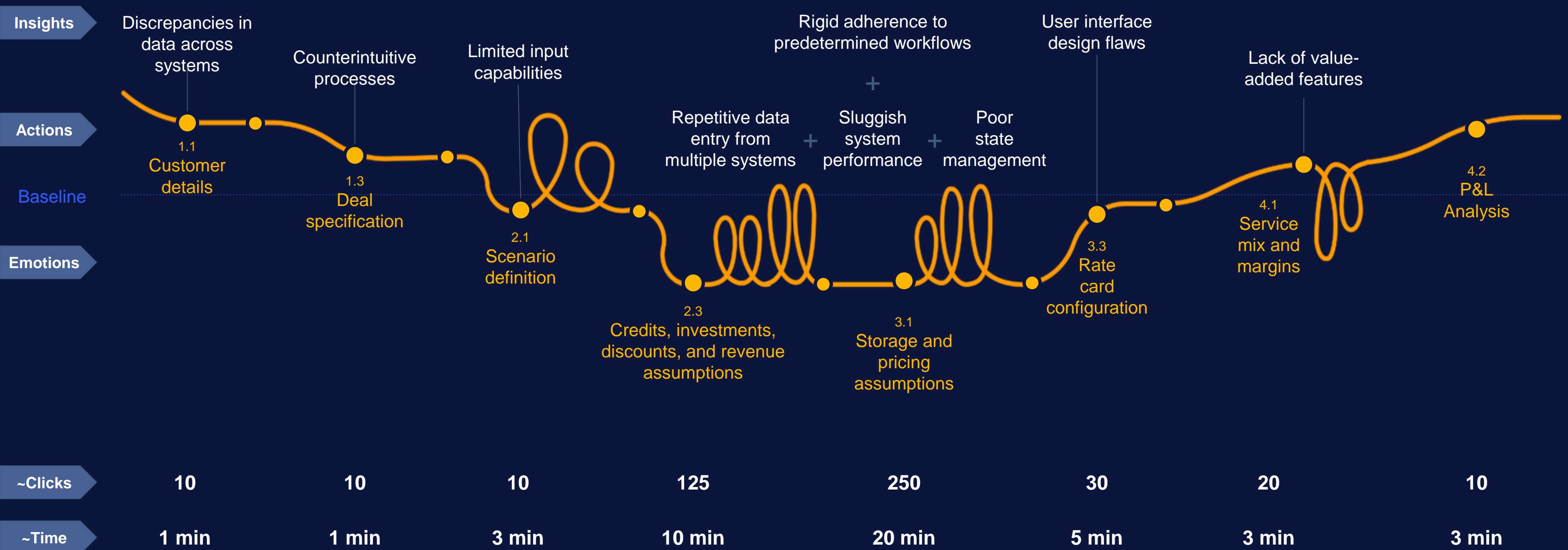
~Average values for a 2-service and 3-year deal

Step 1 — Create request

Step 2 — Configure scenario(s)

Step 3 — Configure service(s)

Step 4 — P&L summary



Enable productivity,  
flexibility, and  
integration at scale.





Users should be able to model deals easily and efficiently

# Enable productivity, flexibility, and integration at scale.

Tool should be able to adopt to a spectrum of use cases and evolving financial models

Workflows across teams should be seamlessly connected



1 Introduce

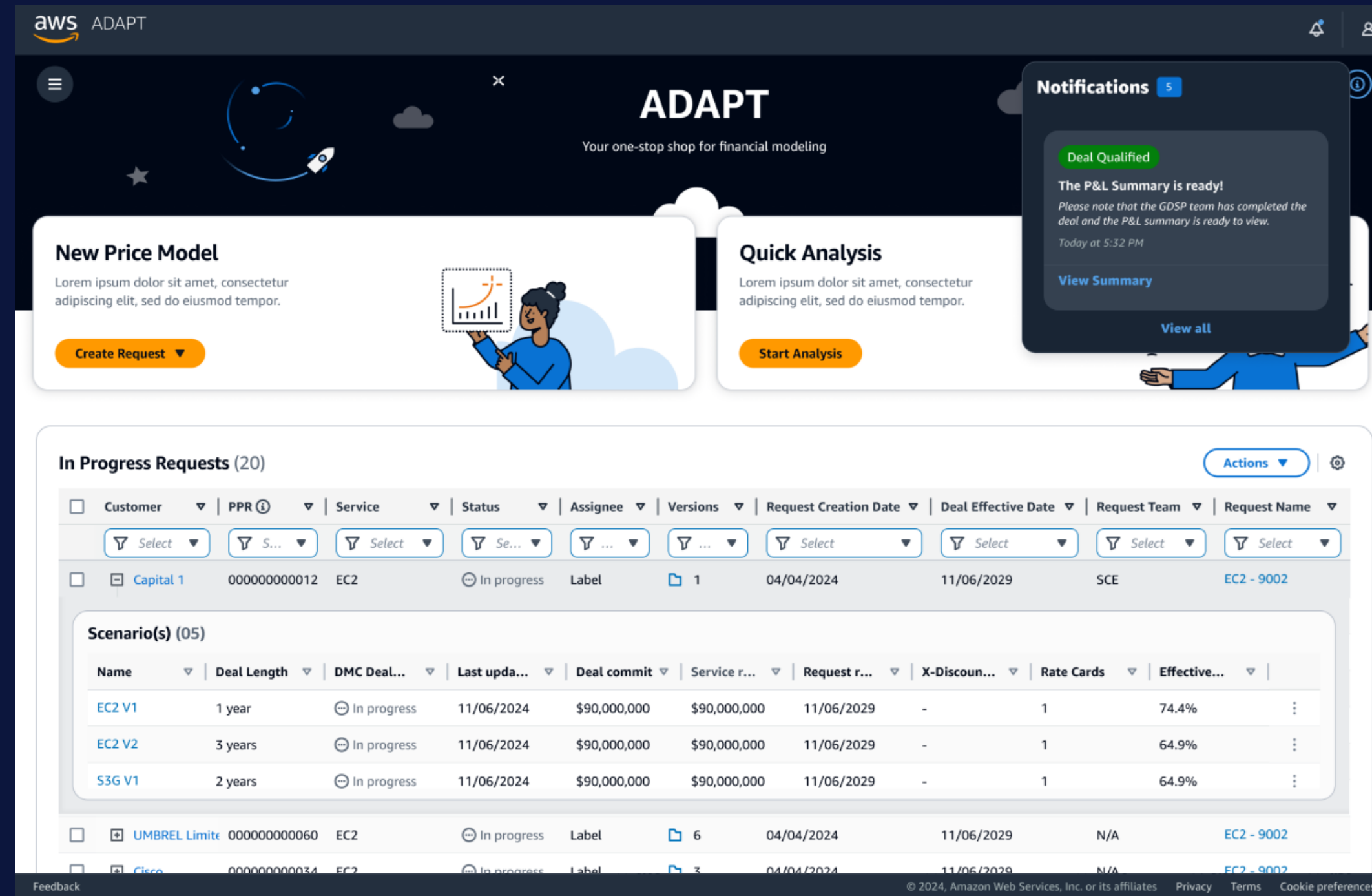
# Connected cross-functional workflows

Reduced clicks from

178 → 2

Reduced average time on task from

15m 54s → <1m



2 Introduce

# Unrestrained price and margin analysis

Reduced effort from

90 → 1 click

Quickened access to analysis from

8m 30s → <5s

Quick Analysis Autosaved 3 minutes ago Share Actions Save Analysis

**Quick Analysis**  
Some copy which talks about this step in the workflow

Customer sector: Public | Annual Contract Value (ACV) category: Small (<= \$1M) | Deal term (In years): 3

Deal Effective Discount: 48.34% ↑ 6% | Deal Infrastructure Margin: 5.5% ↑ 3% | Deal Contribution Margin: 19.56% ↑ 2% | Deal Net Margin: 62.34% ↑ 5%

Price Model (7) Table Chart Add Combinations

	1	2	3	4	5
SKUs					
New Instance?	No	No	No	No	No
TCO ID	N/A	N/A	N/A	N/A	N/A
TCO					
Instance	C3	C5N	C3	C3	C4
Size	4xlarge	2xlarge	Large	Large	2xlarge
Infrastructure margin by instance	82.4%	87.4%	87.4%	87.4%	88.6%
Contribution margin by instance	68.4%	66.4%	66.4%	66.4%	70.1%
Net margin by instance	86.4%	81.4%	81.4%	81.4%	82%



3 Introduce

# Multi-scenario configurator

From

Multiple requests per deal

To

One request w/multiple deals

>50% reduction in input time

EDP-R001 Autosaved 3 minutes ago [Actions](#) [Upload Excel Template](#) [Proceed](#)

### Configure Scenario (EC2)

Some copy which talks about this step in the workflow

[EC2 - V1](#) | [EC2 - V2](#) | [+ Add Scenario](#)

---

#### General

Scenario Information

Scenario Name - optional: EC2 - V1 - optional

Scenario Type: Lean In

Deal Length (Yr): 3

Annual Contract Value (ACV) Category: Small (<=1m)

Total Contract Value (TCV\$): \$20,00,000

Total Service Revenue (\$): \$10,00,000

---

#### Deal Term Information

Commitment Distribution

Operating System	Total		Year 1	Year 2	Year 3
Total Contract Value (TCV\$)	\$20,00,000	<input checked="" type="radio"/> Evenly split	\$6,66,666.66	\$6,66,666.66	\$6,66,666.66
Total Service Revenue (\$)	\$10,00,000	<input checked="" type="radio"/> Evenly split	\$3,33,333.33	\$3,33,333.33	\$3,33,333.33
X-Service Discount (%)			0%	0%	0%

---

#### More Information

General Information



4 Introduce

# Single-pane deal status tracker

Reduced coordination and tracking time from

40m → 5 m

**EDP - R001** Autosaved 3 minutes ago Submit

### Review & Submit

Some copy which talks about this step in the workflow

[Review Summary](#)

Custom Rate Card(s) | **Multi Service**

Scenario(s)	Rate Card(s)	Cross Services(s)	GDSP Finance
<a href="#">V1</a> Rate Card & Cross Services <input checked="" type="checkbox"/>	<b>▼ V1 - Rate Cards</b> 3 Rate Cards	<b>▼ V1 - Cross Services</b> 2 Cross Services	
	<a href="#">EC2 - V1</a> <span>Draft</span> \$100,000,000 . 3Y . Lean-in Step-up	<a href="#">DTAZ</a> <span>Ready</span> \$100,000,000 . 3Y . Lean-in Step-up	
	<a href="#">S3G - V1</a> <span>Ready</span> \$100,000,000 . 3Y . Lean-in Step-up	<a href="#">DTIO/DTIR</a> <span>Ready</span> \$100,000,000 . 3Y . Lean-in Step-up	
	<a href="#">CF - V1</a> <span>Ready</span> \$100,000,000 . 3Y . Lean-in Step-up		
	<b>► V2 - Rate Cards</b> 3 Rate Cards	<b>► V2 - Cross Services</b> 2 Cross Services	



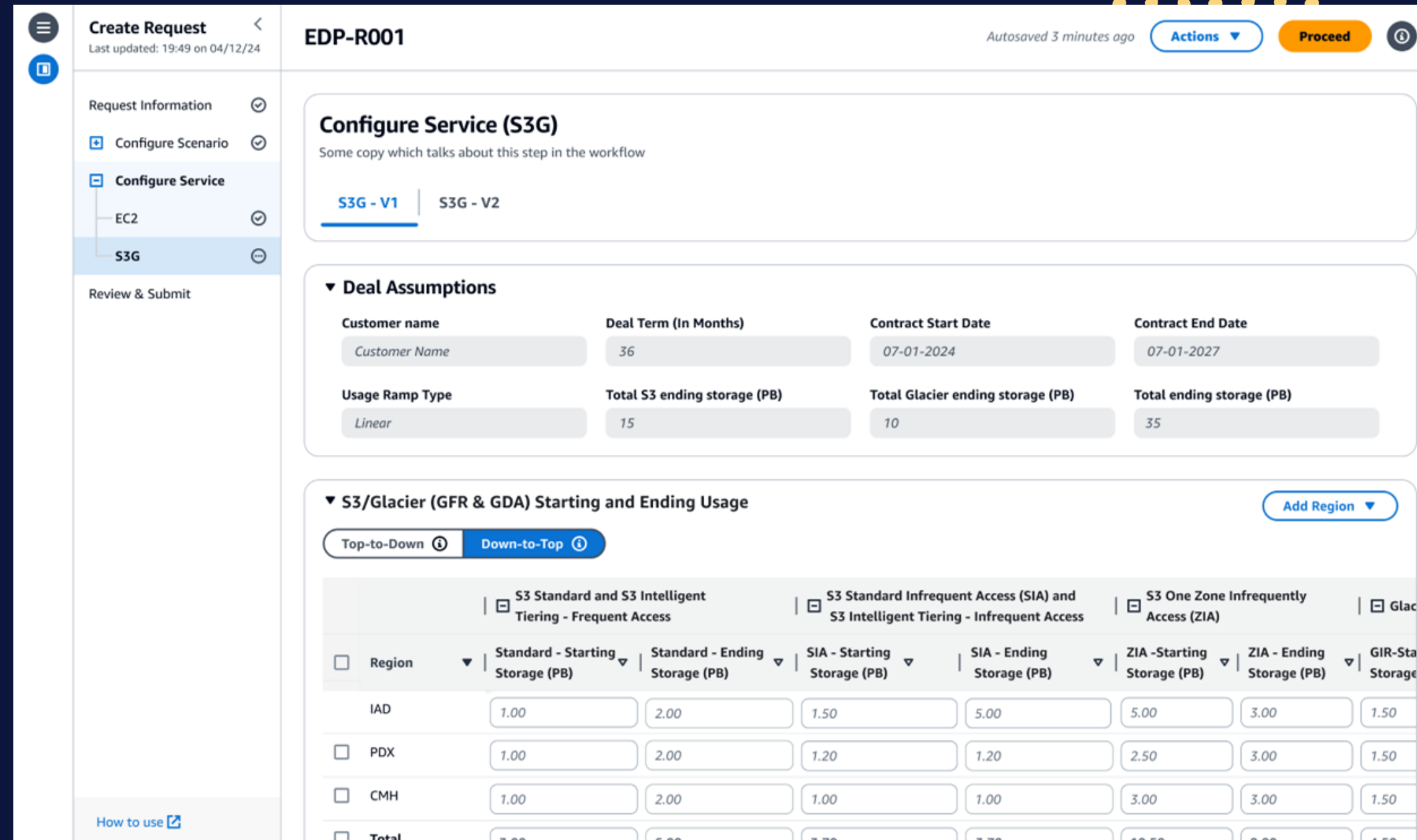
5 Optimize

# Non-sequential workflow navigation

From 11 forced sequenced pages

To 6 pages with flexible navigation

>35% reduction in task completion time



# Gen AI-Assisted custom deal structuring and forecasting

Streamlined deal creation with AI-powered assistance and insights

The screenshot displays the AWS ADAPT 'Configure Template' interface for a 'Netflix Deal'. The main area shows an 'Existing Price Model' table with columns for 'Attributes' and 'Values'. Below this, a list of 'Attributes (6 Selected)' is shown, including 'Econ life (default)', 'Utilization (default)', 'No. of vCPU', 'Complete rack cost', 'Software costs', and 'Weighted DC position cost'. Other visible attributes include 'Server count per rack', 'Instance num per rack', 'PPD value', 'Normalization factor', 'OS uplift v. cost', 'Cost rate', 'SOVC (as % of Net Price)', 'Infra overhead (as % of Net Price)', 'Fixed cost (as % of Net Price)', 'Discount', 'Concessions', 'Infrastructure margin by instance', and 'Contribution margin by instance'. A Jarvis AI assistant window is overlaid on the left, showing a greeting 'Hello, John' and a list of tasks: 'Optimize deal structure and pricing', 'Optimize resource allocation', and 'Create a custom deal'. A text box shows a user's request: 'I'd like to create a deal for Netflix with 3 services: EC2, S3, and CloudFront. The primary requirement is media storage for the APAC regions. The deal needs to be structured for 2 years with the best possible discounts. I'd like for the net margins to be >17% and instance margins >35%. You are free to choose the pricing model(s) that fit my criteria. I'd like to see 3 good case and corresponding worst case scenarios.'

Maximized profitability with optimized pricing models and dynamic deal structuring





Learn

“These efficiency gains will allow us boost our sales capacity and handle more custom deals effectively — giving us the ability to focus on more opportunities that drive our business’s topline growth.”

AWS Deal Modeler





Learn

# 1500+

Hours yearly  
Unlocked sales capacity

# \$6.5B+

Revenue potential  
Unlocked with financial insights

The screenshot shows the AWS ADAPT interface. At the top, it says 'aws ADAPT' and 'ADAPT Your one-stop shop for financial modeling'. Below this are two main cards: 'New Price Model' with a 'Create Request' button and 'Quick Analysis' with a 'Start Analysis' button. The bottom section is titled 'In Progress Requests (20)' and contains a table with columns for Customer, Request ID, PPR, Milestone, Status, Workflow, Creation Date, Effective Date, SCE Prim..., SCE Seco..., and Customer ID. The table lists 10 rows of data, all with a status of 'In progress'.

Customer	Request...	PPR	Milestone	Status	Workfl...	Creation Date	Effective Date	SCE Prim...	SCE Seco...	Custom...
Customer	EC2 - R002	000000000012	Deal Structuring	In progress	Amendment	04/04/2024	11/06/2029	alias	alias	12345678
Customer	EC2 - R001	000000004567	Deal Structuring	In progress	Amendment	04/04/2024	11/06/2029	alias	alias	12345678
Customer	EC2 - R003	000000000018	NM Analysis	In progress	Amendment	04/04/2024	11/06/2029	alias	alias	23345678
Customer	EC2 - R004	000000000034	NM Analysis	In progress	New	04/04/2024	11/06/2029	alias	alias	32345678
Customer	EC2 - R005	000000000067	NM Analysis	In progress	Amendment	04/04/2024	11/06/2029	alias	alias	34345678
Customer	EC2 - R006	000000000023	Deal Qualification	In progress	Amendment	04/04/2024	11/06/2029	alias	alias	23345678
Customer	EC2 - R007	000000000023	Deal Qualification	In progress	Amendment	04/04/2024	11/06/2029	alias	alias	45345678
Customer	EC2 - R008	000000000060	Deal Qualification	In progress	Amendment	04/04/2024	11/06/2029	alias	alias	98345678
Customer	EC2 - R010	000000000034	Deal Structuring	In progress	Amendment	04/04/2024	11/06/2029	alias	alias	12945678





Proactive

# Delight the customer

Creating an ideal experience  
for the AWS Finance User





“Each tool today owns its specific area and purpose. So, as a user, I need to navigate to over 20 tools to manually consolidate financial reports and insights”

AWS Finance Manager



# 58

## Unique tasks during Month-End Close across 22 days and 8 systems

# 10+ hrs

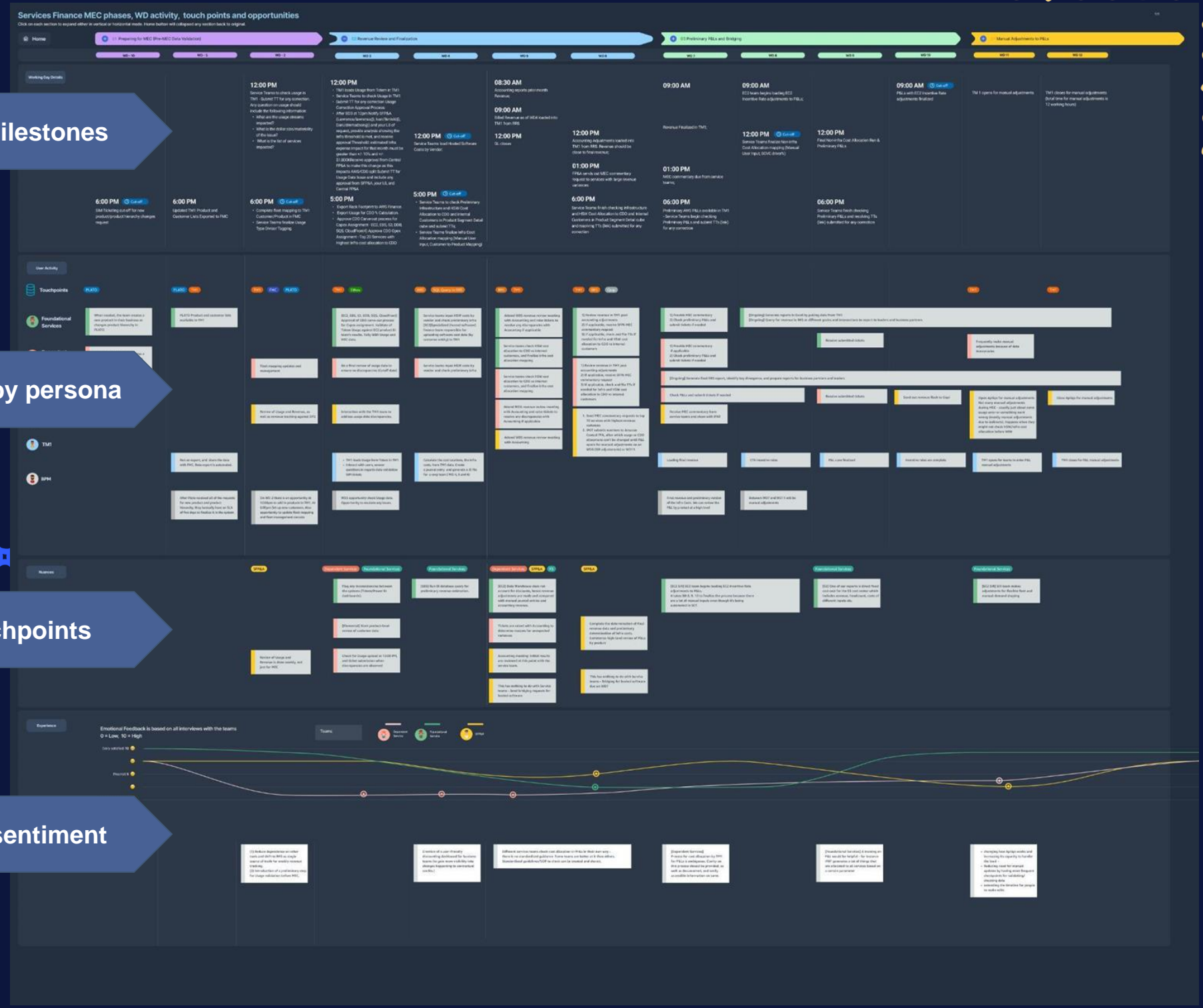
## Average time spent querying data per service portfolio

Key milestones

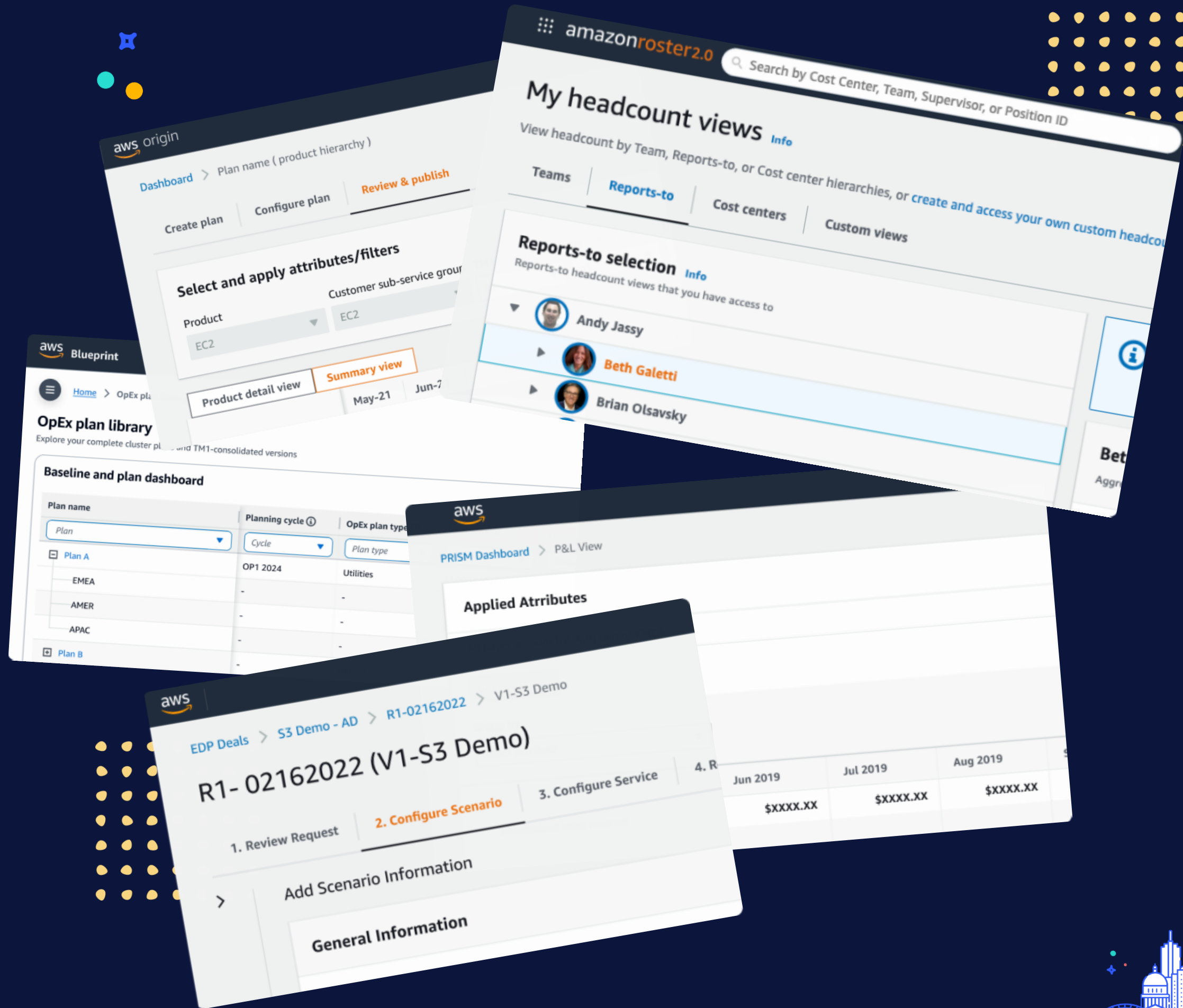
Tasks by persona

Touchpoints

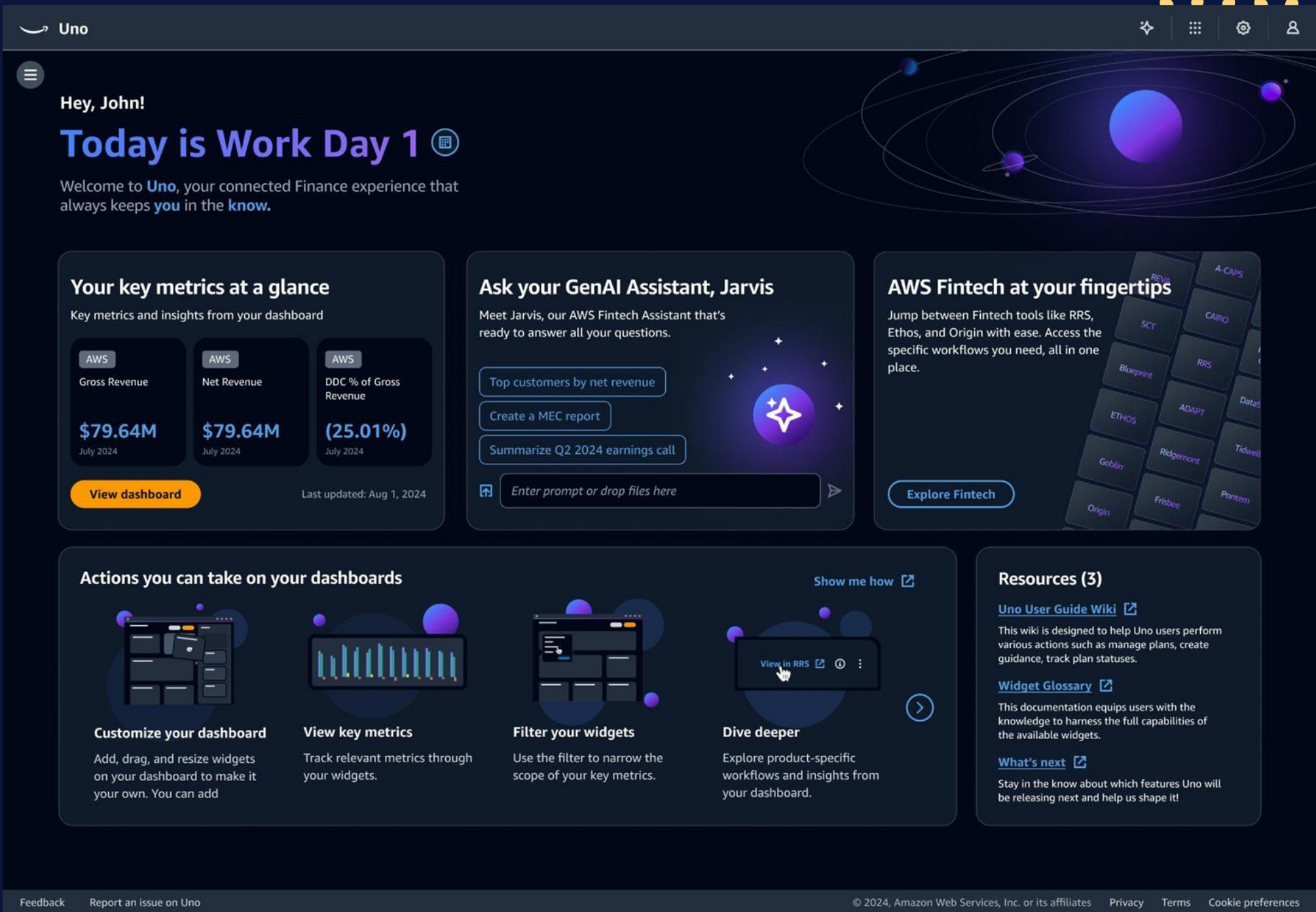
User sentiment



# From 27 applications



From 27 → 1 applications



# From observation, insight, to delivery

Uno started as an idea on week 1 of joining and has become foundational to our 3 year vision

**2.9/5**

CES score

**24**

Users interviewed

**24**

JTBD identified

**5**

CXO themes mapped

**90%**

Monthly hours saved

**99%**

Accurate queries

Listen

## What we heard

Users reported challenges in managing responsibilities across multiple products. Meanwhile, the industry is shifting towards more comprehensive Enterprise Performance Management (EPM) tools.

Link

## How it became an

**insight** Customer Experience Outcome (CXO) themes were derived such as Connected experiences, Streamlined workflows, Reporting, Controllorship, and Data analysis.

Learn

## What action we

**took** Created north star concepts and introduced Gen AI to streamline and elevate the quality of decision-making.



# This is the story of how we established value and grew influence over time.





Week 1 A hunch

# Consolidating purpose-built workflows into one experience

Number of users that rely on multiple tools

# 191/328

The screenshot displays the AWS Uno dashboard for 'FinTech Uno'. At the top, there's a search bar and a user profile. The main content is organized into several sections:

- Your org at a glance:** A row of five metric cards showing values: 45, 345, \$2.27M, 1000, and 20,800.
- Pending Actions (3):** A table listing tasks like 'Review the P&L report for 2023' with columns for Task Name, Finance period, Status, Due date, and Link to action.
- Expected GAAP Revenue Sep. 2022:** A donut chart showing revenue distribution by region: CHINA (40 units, 40%), EMEA (10 units, 10%), APAC (20 units, 20%), AMER (25 units, 25%), and GBLB (40 units, 40%).
- Cost over time:** A line chart showing 'Net Margin' over 12 periods (x1-x12) against a 'Performance goal'.
- Accounts recievable:** A table showing AR issues with columns for AR Issue, GUC, Amount, Amount utilized, and Notes.
- Statements and Reports:** A table showing report details with columns for AR Issue, Report Type, Date of last edit, Finance period, and Status.
- Manage team headcount:** A row of 10 team member profile pictures with names: Sanjay Sing, Christine Lee, Danny Nelson, Gretchen Stephenson, Igal Hendel, Kevin Gasper, Leah Exten, Molly Johnson, Nathan Hunt, and Patrick Scully.

Month 3 Strategize

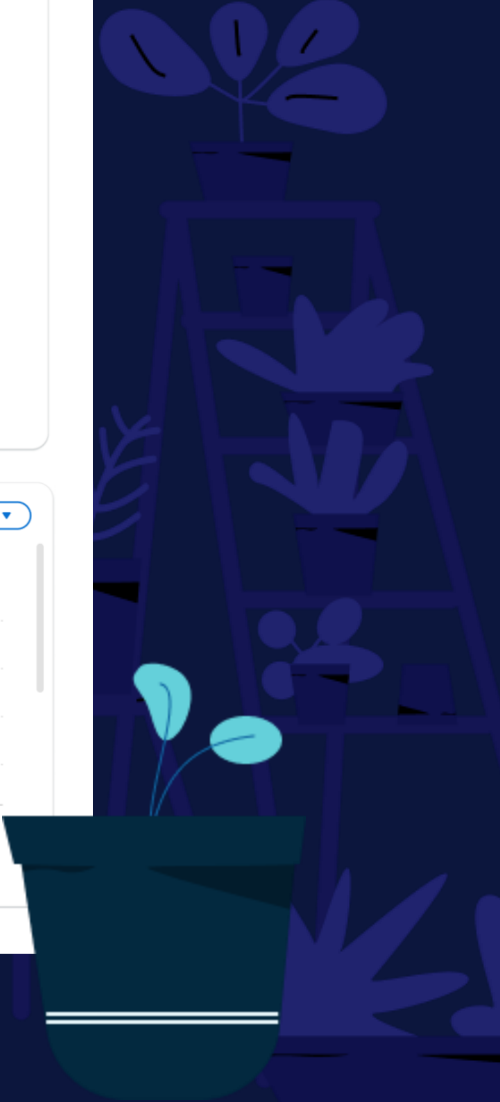
# Saving time by integrating workflows and showing pending actions

Reduced workflows from

7 → 1

The screenshot displays the AWS FinTech Uno dashboard with the following sections:

- Revenue:** Shows YoY Growth (\$1,340.16m, 81.90% ↑), QoQ Growth (\$2,130.15m, 84.73% ↑), and MoM Growth (\$2,276.76m, 88.49% ↑). Includes a line chart for Profits & Loss over 12 periods.
- Tasks to Complete:** A table listing tasks like 'Review P&L 2023' with columns for Task Name, Period, Status, and Due date.
- Current Releases:** A list of recent releases such as 'ADAPT launches automated S3 deal modeling workflows'.
- Expected GAAP Revenue:** A donut chart showing the distribution of revenue across regions: CHINA (40 units, 40%), EMEA (10 units, 10%), APAC (20 units, 20%), AMER (25 units, 25%), and GBLB (40 units, 40%).
- Recommendations:** A list of placeholder recommendations with titles and brief descriptions.
- Cost by Service:** A pie chart showing 'Total AWS Cost' with EC2 at \$5,622,546 (28%), and a bar chart comparing CapEx and OpEx from 2020 to 2023.



Month 6

Shared Vision

# Increasing efficiency by incorporating GenAI

Saved time querying per month from

10hrs → 1

The screenshot displays the AWS Uno dashboard for 'May 2023 Service P&L'. It includes a summary of key metrics, a revenue trend chart, and a detailed breakdown table. An 'Ask Uno' chat interface is active on the right, showing a user request to generate a narrative from the report.

Metric	Value	Change
Actuals 2023 May	\$7,214m	
Actuals 2022 May	\$6,477m	
OP2 May 2023	\$6,442m	
Actuals vs OP2 2023	(\$168)	5%
Actuals vs Actuals 2023 vs 2022	\$937k	3%

Scenario	Value
Actuals 2023	\$7,214m
OP2 2023	\$7,402m

Services	Revenue	Infra	IP	IM%
Compute Services Group	\$xxx	\$xxx	\$xxx	xx%
Storage Services Group	\$xxx	\$xxx	\$xxx	xx%
Database Services Group	\$xxx	\$xxx	\$xxx	xx%
Analytics Services Group	\$xxx	\$xxx	\$xxx	xx%
Networking Services Group	\$xxx	\$xxx	\$xxx	xx%

Month 12

Business & Customer Insights

# Introducing actionable insights and personalization

Perceived Customer Effort Score increase

2.9 → 3.8

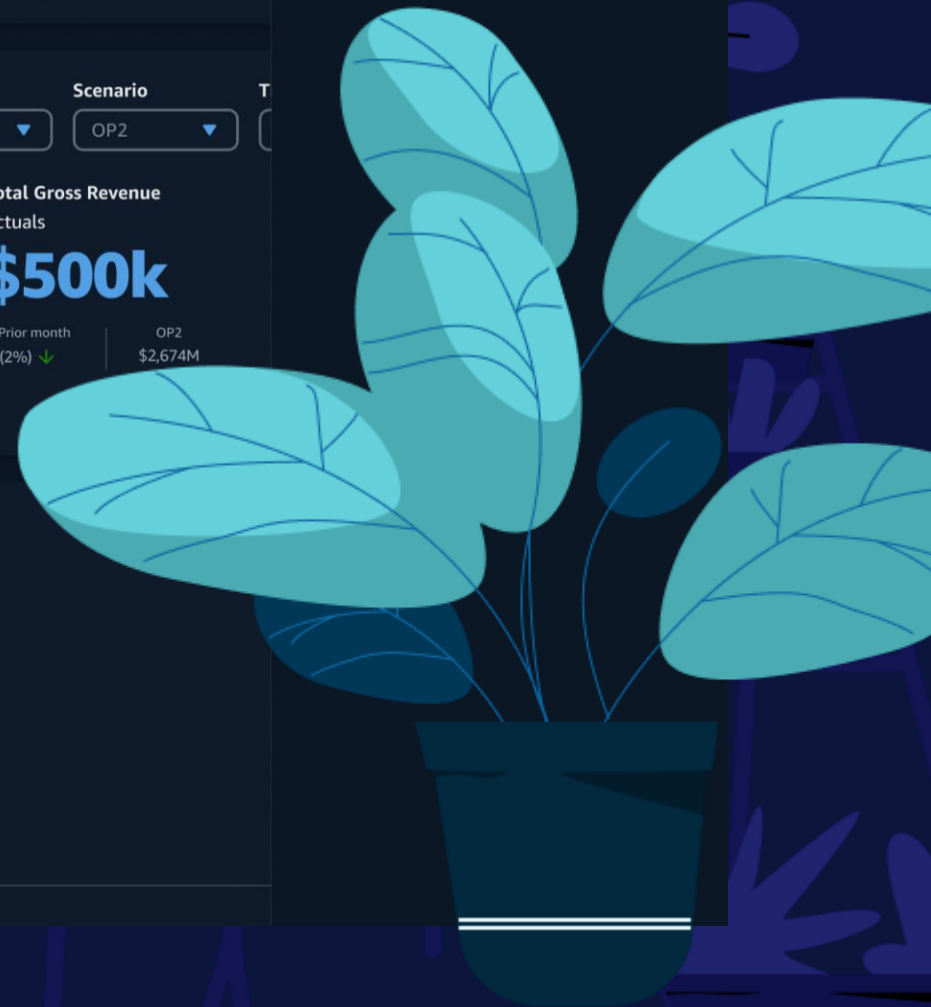
The screenshot shows the AWS Uno dashboard interface. At the top, there's a search bar and a 'Good Morning, Victor!' greeting. Below that is an 'Ask Uno' chat interface with a search bar and several suggested prompts: 'What are the top services?', 'External usage of foundational services', 'Internal usage of foundational services', and 'HC impacting OpE'. The main dashboard is divided into several sections:

- Launch Announcement:** 'RRS - Standard Revenue Accounts' launched in October 2023. Includes a quote from a Finance Manager and a rocket icon.
- System health:** Shows current status of systems for 'TM1' in 'US East'. A red alert indicates 'System outage detected'.
- Pending Actions:** Lists upcoming actions, including 'There is open headcount that needs review' and 'Approvals need your attention in Amazon Approvals'.
- Revenue Summary:** Provides an overview of revenue with four key metrics:
 

Metric	Actuals	Prior month	OP2
AWS Revenue	\$4.37m	(2%) ↓	\$2,674M
Revenue Run-Rate	\$2.12m	(2%) ↓	\$2,674M
Incremental Run-Rate	\$1.34m	(2%) ↓	\$2,674M
Total Gross Revenue	\$500k	(2%) ↓	\$2,674M
- Monthly Forecast Trend:** Compares service revenue with three scenarios:
 

Scenario	Revenue	Growth (MoM%)	Growth (YoY%)
P20 Nowcast Revenue	\$7.64B	(1.0%) ↓	11.6% ↑
Mean Nowcast Revenue	\$7.66B	(0.8%) ↓	11.9% ↑
P80 Nowcast Revenue	\$7.67B	(0.6%) ↓	12.1% ↑

On the right side, there's a 'Widget' panel with 'Revenue Summary' selected, showing 'Data source: RRS' and a 'Download Report' button. Below that, a notification states 'EC2 ASP MoM growth rate is high' with a 'View details' button. Another notification shows 'External usage of foundational services'.



Learn

Month 18

MLP is defined

# Achieving business outcomes faster

Increased querying accuracy to

# 99%

Customer Panel in support of Uno's launch

# 30/30



The customer panel includes the following sections:

- Personalized Greeting:** "Hey, John! Today is Work Day 1" with a welcome message.
- Your key metrics at a glance:** Three cards showing Gross Revenue (\$79.64M), Net Revenue (\$79.64M), and DDC % of Gross Revenue (25.01%) for July 2024.
- Ask your GenAI Assistant, Jarvis:** A chat interface for asking questions, with prompts like "Top customers by net revenue" and "Summarize Q2 2024 earnings call".
- Actions you can take on your dashboards:** Four cards for "Customize your dashboard", "View key metrics", "Filter your widgets", and "Dive deeper".
- Resources (3):** Links to "Uno User Guide Wiki", "Widget Glossary", and "What's next".



# Delighting customers with key features

J What did Amazon report as AWS Revenue for Q4 2023?

Based on the information provided in the contextual background, here are the key points summarizing Amazon's Q4 2023 earnings: - Net sales increased 5% [2] year-over-year to \$100.0 [1] billion in Q4 2023 - Operating income was \$10.0 [3] billion, up significantly from \$2.0 [4] billion in Q4 2022 - Net income was \$10.0 [8] billion, or \$1.00 [7] per diluted share, compared to \$0.3 [5] billion or \$0.05 [6] per share in Q4 2022

► Citations

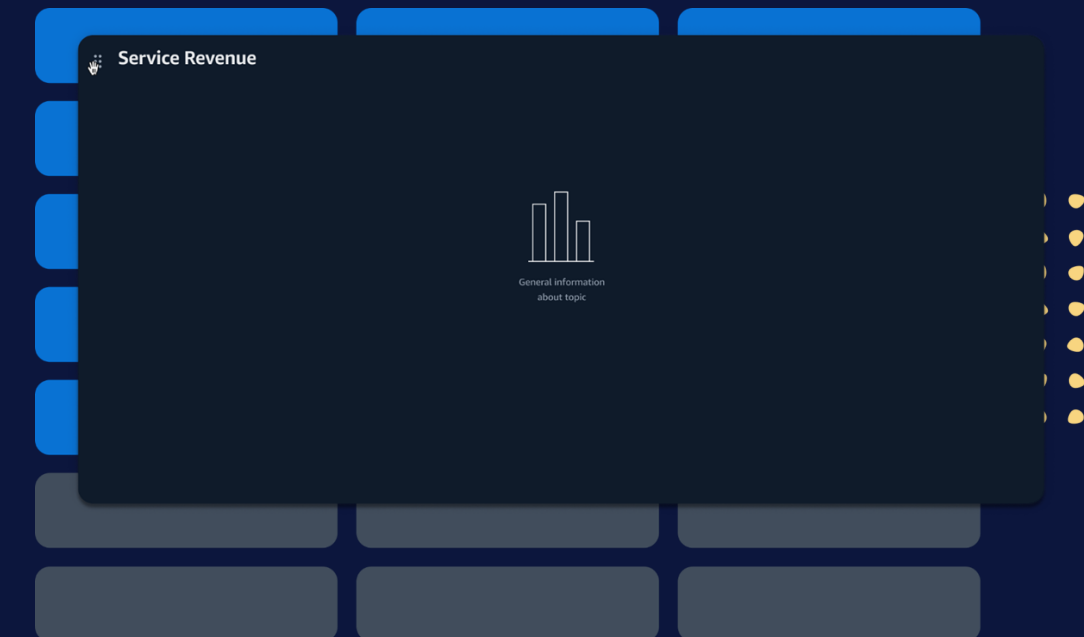


## TM1 Outage causing data discrepancy

TM1 underwent an outage for 2 hours yesterday, data may have some discrepancies between dates. Check the latest updates on TM1.

Today at 5:32 AM

[Check updates](#)



## Increase efficiency

Our genAI assistant guides users with prompts and data querying to streamline interactions and increase task completion.

## Stay proactive

Timely notifications ensures users remain engaged and aware of critical updates.

## Own your experience

Users can configure their dashboard, keeping them engaged with metrics that matter most to their needs.



# AWS Financial System, Uno

Uno

Hey, John!

## Today is Work Day 1

Welcome to **Uno**, your connected Finance experience that always keeps **you** in the **know**.

### Your key metrics at a glance

Key metrics and insights from your dashboard

AWS	AWS	AWS
Gross Revenue	Net Revenue	DDC % of Gross Revenue
<b>\$79.64M</b> July 2024	<b>\$79.64M</b> July 2024	<b>(25.01%)</b> July 2024

[View dashboard](#) Last updated: Aug 1, 2024

### Ask your GenAI Assistant, Jarvis

Meet Jarvis, our AWS Fintech Assistant that's ready to answer all your questions.

- Top customers by net revenue
- Create a MEC report
- Summarize Q2 2024 earnings call

Enter prompt or drop files here

### AWS Fintech Navigator

Go deep into workflows by navigating across Fintech products and services.

[Explore Fintech](#)

### Actions you can take on your dashboards

- Configure your dashboard**  
Add, drag, and resize widgets on your dashboard to make it your own. You can add
- View key metrics**  
Track relevant metrics through your widgets.
- Filter your widgets**  
Use the filter to narrow the scope of your key metrics.
- Dive deeper**  
Head into your widgets product-specific workflows to continue or start analysis.

### Resources (3)

- [Uno User Guide Wiki](#)  
This wiki is designed to help Uno users with various actions such as manage product, track plan statuses.
- [Widget Glossary](#)  
This documentation equips users with the knowledge to harness the full capabilities of the available widgets.
- [What's next](#)  
Stay in the know about which features Uno will be releasing next and help us shape it!

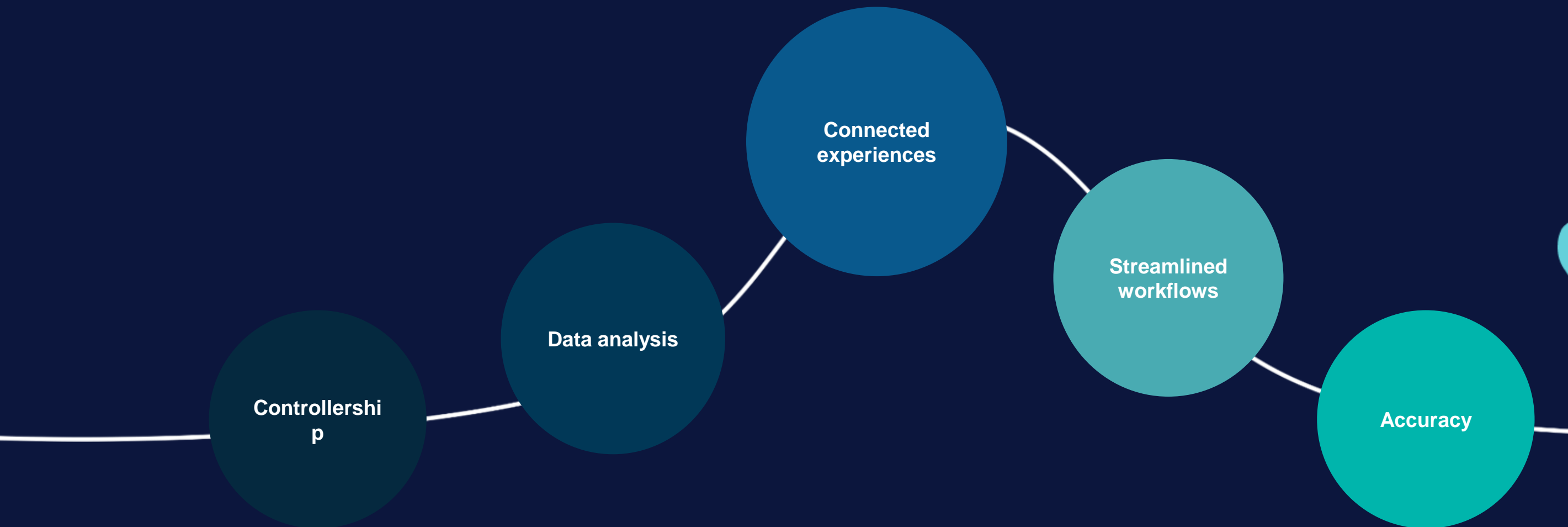
Feedback Report an issue on Uno

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Year 2 & Beyond

3 Year Vision

# A goal to improve our CES through outcomes





Transparency 

Productivity 

# Connected experiences

Personalization 

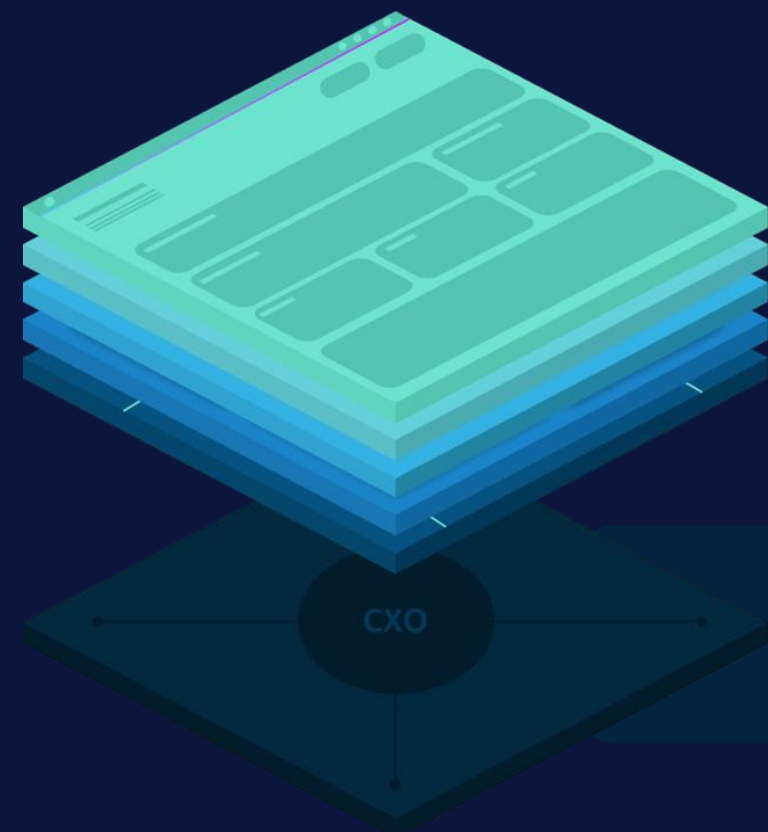
Trust 

Year 2 & Beyond

3 Year Vision

# Key part of the 3-year vision

CXO



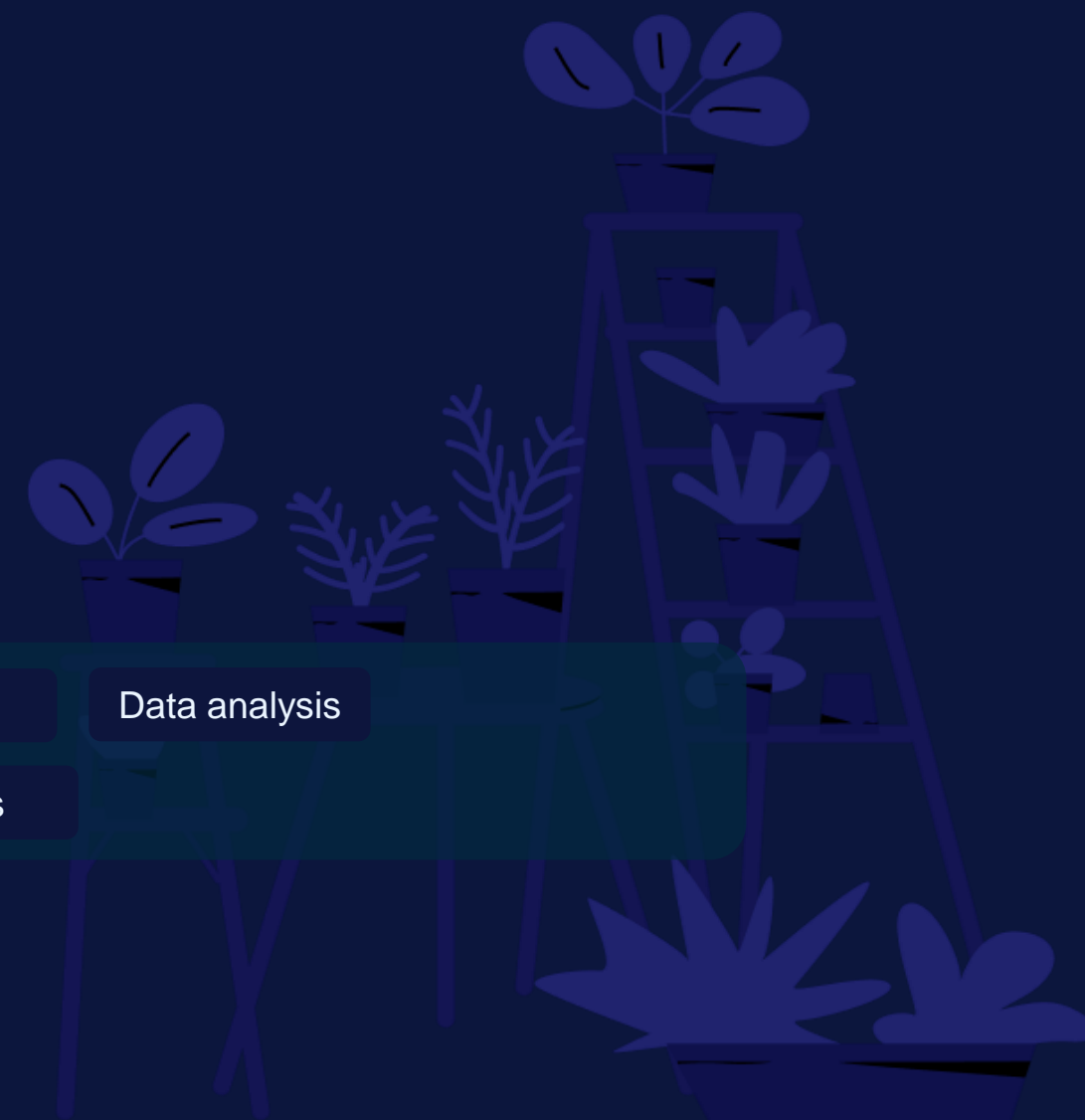
Connected experiences

Reporting

Data analysis

Controllershship

Streamlined workflows



Data layer

CXO



Metric Library

Connected experiences

Reporting

Data analysis

Controllershhip

Streamlined workflows

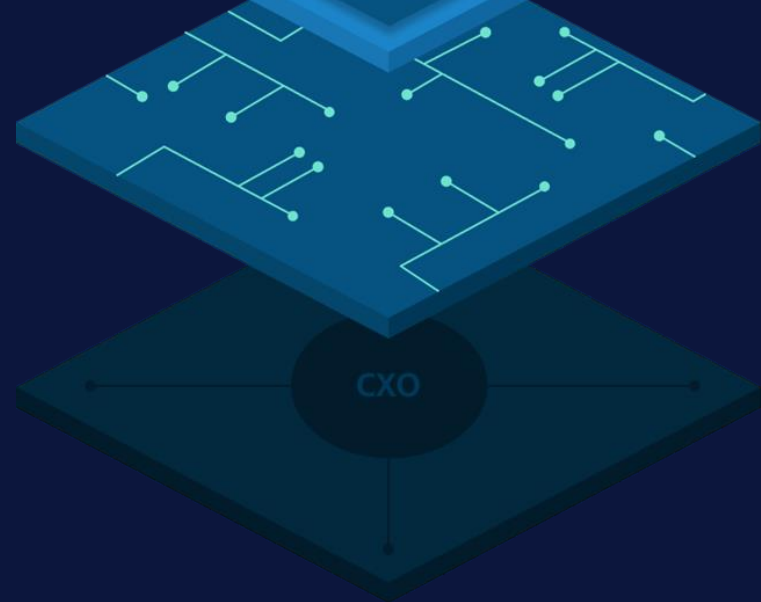
Services



Data layer



CXO



Notifications    GenAI/Jarvis    Scenario Modeling  
Permissions    Bridging    Commentary

Metric Library

Connected experiences    Reporting    Data analysis  
Controllershship    Streamlined workflows



Modules



Insights

Services

Data layer

CXO

Planning   MEC/R&O/OP<sub>1</sub>   Profitability   Cost analysis

Headcount Planning   Deal modeling   Reporting   Accounting

Profitability   Operational efficiency   Revenue growth

Anomaly   Variance

Notifications   GenAI/Jarvis   Scenario Modeling

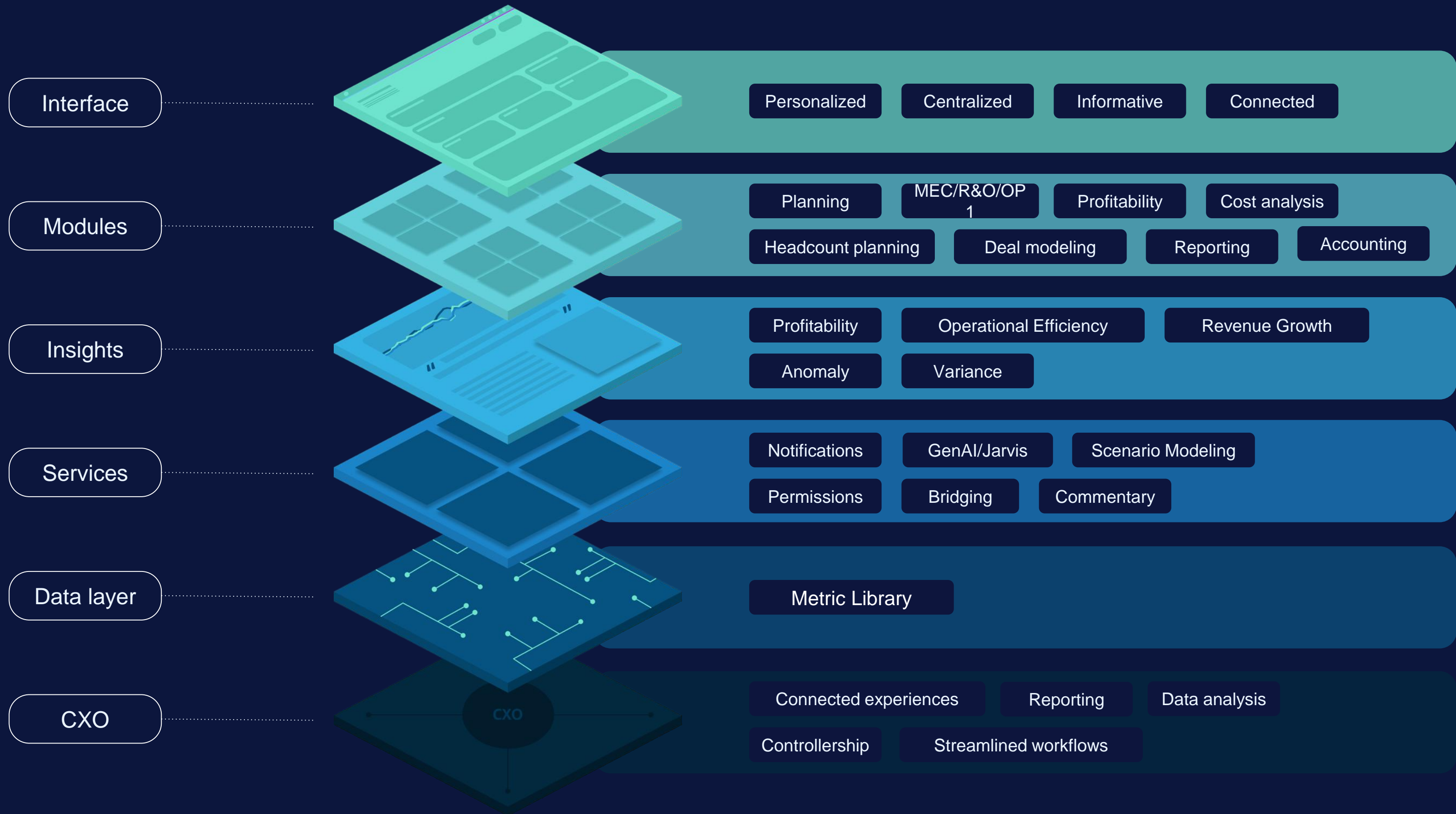
Permissions   Bridging   Commentary

Metric Library

Connected experiences   Reporting   Data analysis

Controllershship   Streamlined workflows

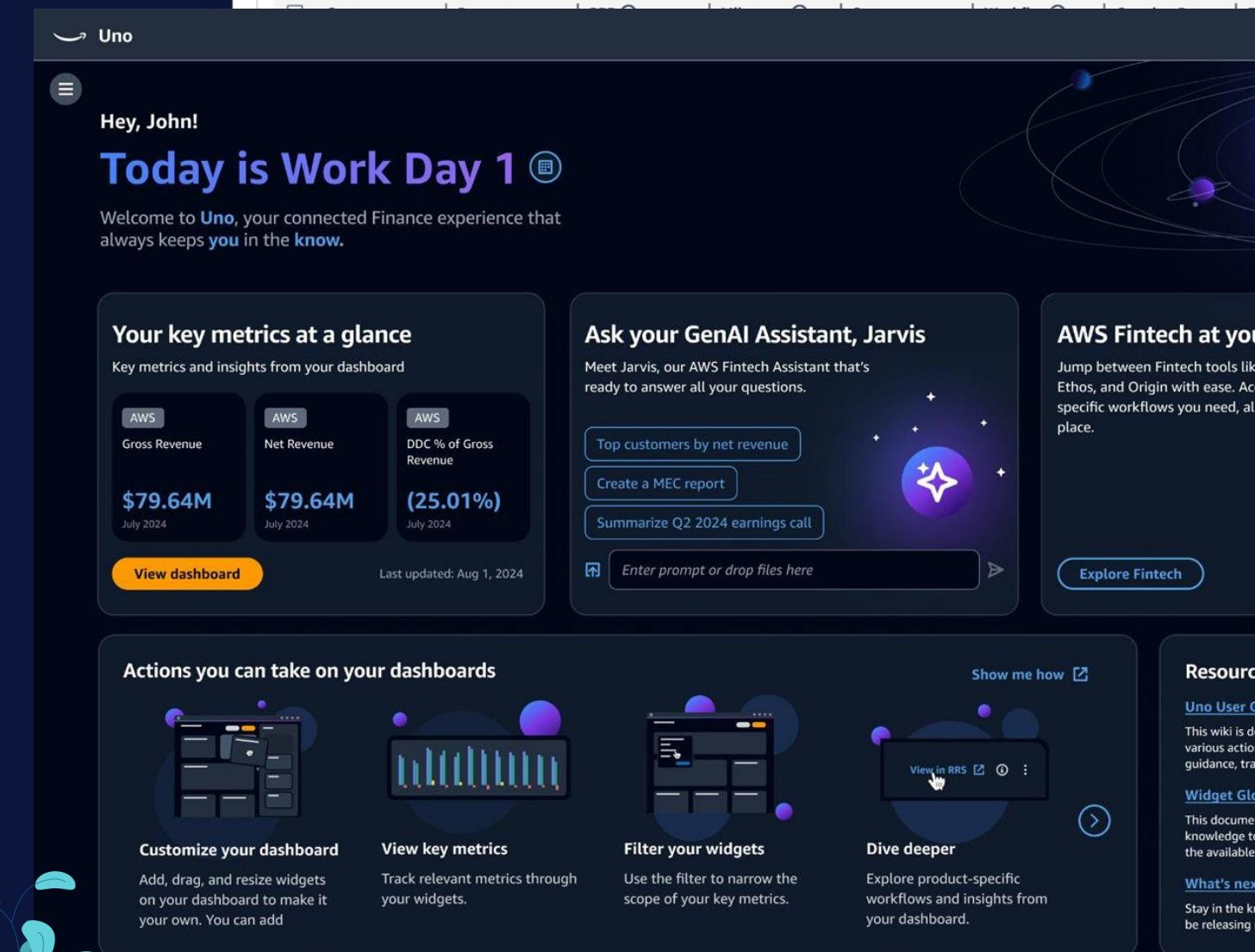
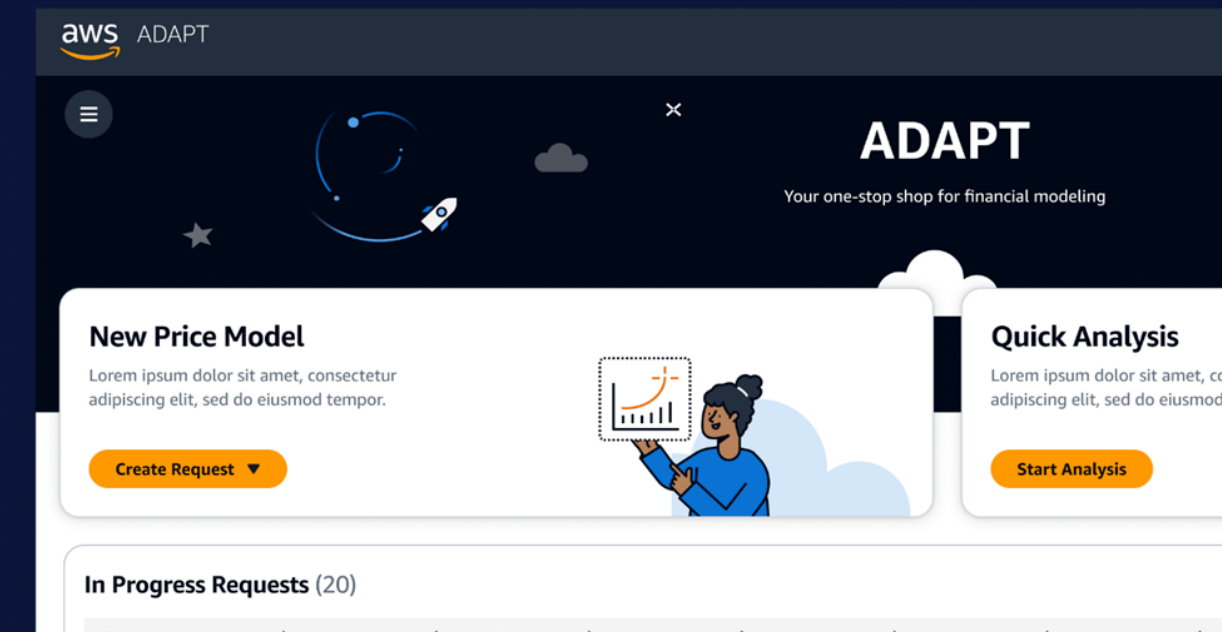






# Innovating Tomorrow

- 1 Observe the Unspoken:** Go beyond stated needs by immersing yourself in users' real-world environments.
- 2 Tell the Story, Share the Vision:** Use visual storytelling to clarify big ideas and align cross-functional teams.
- 3 Think Big, Start Small:** Aim for monumental impact, delivered in strategic, value-driven steps.
- 4 Influence Over Authority:** Lead with patience —great leadership earns trust, not commands.
- 5 Persist with Purpose:** Let data and logic fuel resilience. Never say never when facts back your path.



User Testing

**THIS**  
The Human Insight Summit

# Thank you!



Connect with Aditi via LinkedIn  
<https://www.linkedin.com/in/aditi-sharma9/>



User Testing



# THIS

The Human Insight Summit

