

# XYZ Company Moderated Usability Research Plan and Discussion Guide Room

By Theresa Wilkinson

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## Overview

A heuristic review of the current Roam demo provided a basis for the current Axure prototype. There are open design questions that have not yet been validated with research.

Moderated usability testing will involve collecting user observations and improving the design based on the feedback. Subsequent rounds will validate changes made to the Axure prototype.

## Roam

Roam empowers social workers and supervisors to make better decisions throughout the life of the case by automatically analyzing an entire case file to provide a quick, meaningful snapshot of specific, detailed information related to a particular person, case, or topic.

## Methodology

The UX team plans to conduct moderated, think-out-loud usability testing with both quantitative and qualitative tasks. All participants will complete several tasks in order to test and measure the design of the prototype and gather usability metrics.

A remote, moderated usability study will be used. Each participant session will last 45 – 60 minutes and will include a briefing, an interview, a task performance and a debriefing. A short survey will also be completed by every participant.

The equipment that will be used for this study is a Dell laptop. Microsoft Internet Explorer 11 will be used. Camtasia will be used to record the sessions.

## Goals

Identify any issues about what is working and not working with the current prototype as it relates to key business requirements and usability.

## Research Questions

- Results, Filters, Explore, Relationships, Events (navigation)
  - Are the areas of the interface intuitive and meet expectations?
  - How would the user expect the interactions to behave?
  - Do they understand the page displays? Is this enough information?

- Who in the agency would use this feature?

## Participants

- 12 participants in Columbus Ohio
- 12 participants in Columbia South Carolina

Total #	24
	20 women
	10 men
Age	18+

## Task Metrics

- Task Success
- Task Time
- Completion Rate
- Effectiveness (= # of tasks completed/# of tasks undertaken x 100%)
- Errors
- Single Ease Question (SEQ)

## Survey Metrics

- Ease of Use
- Errors
- CSAT Customer Satisfaction Score

## Schedule

The moderated usability study will be conducted in January of 2015.

# Discussion Guide

## Introduction to Testing Session

Hi, (participant name). Thank you for your time. We will be testing the usability of this application and seeing if it works as it is intended. Before we begin, I will describe the session so there are no surprises.

This session should take about 45 minutes. If you need a break at any point please let me know. There are no right or wrong answers. We are testing the application, not you, so you don't have to worry about making mistakes. Also, please don't think that you are going to hurt our feelings. We are doing this to improve the application, so we need honest reactions.

I will begin by asking you a few questions as a warm up -- nothing too personal. If you don't want to answer a question, you don't have to. This will be quite short. Then I will give you a few activities to do on the application. We want to see the process of completing these activities so that we can adjust for the optimal usability of the application. Lastly, we will close the session with some final questions, remarks and a short recap.

As you use the application in this session, I'd like to ask you to think out loud as much as you can. Simply say what you're looking at, what you're trying to do and what you're thinking. If you have any questions, feel free to ask me. However, I may not be able to answer them right away, as we are interested in how participants go through the activities without someone giving any help.

This session will be recorded. The recordings will only be used to help us figure out how to improve the application. They won't be seen by anyone except the people working on this project. They also help me look back at the session, in case I missed any notes.

Do you have any questions before we start?

## Opening Questions

Before we look at the application, I'd like to ask you a few simple questions.

1. What do you like doing in your spare time?
2. How many hours a week (just an estimate) do you spend using the internet per day?
3. What's the split between browsing, email and social media? A rough percentage.
4. What kind of websites do you visit?
5. Do you have any favorite websites?

Great, we're done with the questions. We can now start looking at the application.

Now we will be taking a short home page tour. Please don't click on anything yet.

1. What is your first impression?
2. What strikes you about the home page?
3. What can you do here?
4. Please look around and give a little narrative

## Activity Scenarios

Thank you. Now you will be given three activities to complete by using the application. Before you begin an activity, please read the instructions out loud. Click on, read through or use anything on the application you think is useful for completing the activity. Please continue narrating what you are doing, feeling and seeing. Remember, there are no wrong answers.

Please read the first activity out loud.

## Activity 1

You just received a new case from another worker. How many individuals are associated with Johnny Doe (case # 1234567)?

- Screens with the answer: All Search (case #), Case # results, Client Detail, Explore
- Do you think there is anywhere else you might find that information?
- Allow the participant to continue until you feel it isn't producing any value or the participant gets very frustrated.
- Ask them to read the SEQ out loud.

Overall, how difficult or easy did you find this task?						
Extremely Difficult	Moderately Difficult	Slightly Difficult	Neither Difficult nor Easy	Slightly Easy	Moderately Easy	Extremely Easy

- Allow participant to stay on same page
- Ask the participant to read the second activity out loud

Goal	Find Johnny Doe's immediate relatives
Input	Name or Case number
Assumptions	User will find information
Steps – Scenario 1	<ol style="list-style-type: none"> <li>1. All Search (case #)</li> <li>2. Case # results</li> <li>3. User selects Johnny Doe</li> <li>4. Client Detail</li> <li>5. Explore – relatives are displayed</li> </ol>
Steps – Scenario 2	<ol style="list-style-type: none"> <li>1. All Search (name)</li> <li>2. People results</li> <li>3. User selects Johnny Doe</li> <li>4. Client Detail</li> <li>5. Explore – relatives are displayed</li> </ol>

Success criteria	Goal of the task is to land on the Explore that lists the relatives
Notes	

## Activity 2

Who is his biological mother? Is their relationship positive, neutral or negative?

- Screens with the answer: All Search (case #), Case # results, Client Detail, Explore
- Do you think there is anywhere else you might find that information?
- Allow the participant to continue until you feel it isn't producing any value or the participant gets very frustrated.
- Ask them to read the SEQ out loud.

Overall, how difficult or easy did you find this task?						
Extremely Difficult	Moderately Difficult	Slightly Difficult	Neither Difficult nor Easy	Slightly Easy	Moderately Easy	Extremely Easy

- Allow participant to stay on same page
- Ask the participant to read the second activity out loud

Goal	Who is his biological mother? Is their relationship positive, neutral or negative?
Input	N/A
Assumptions	User will find information
Steps	User may have to navigate back to the Explore page to find his mother page and then should see information about their relationship
Success criteria	Goal of the task is to land on the Explore that lists the relatives
Notes	



### Activity 3

What happened on Oct 29? Was it positive, negative or neutral?

- Screens with the answer: Events
- Do you think there is anywhere else you might find that information?
- Allow the participant to continue until you feel it isn't producing any value or the participant gets very frustrated.
- Ask them to read the SEQ out loud.

Overall, how difficult or easy did you find this task?						
Extremely Difficult	Moderately Difficult	Slightly Difficult	Neither Difficult nor Easy	Slightly Easy	Moderately Easy	Extremely Easy

Goal	Find the event that happened
Input	N/A
Assumptions	User will find information
Steps	<ol style="list-style-type: none"> <li>1. User may have to navigate back to the Explore page</li> <li>2. Events</li> </ol>
Success criteria	Goal of the task is to land on the Events
Notes	

### Closing Questions

I have some final questions and remarks for you about the testing session. Then we will do a short recap.

1. How did you feel about the activities?
2. What did you like about the application?
3. What didn't you like about the application?
4. Was it easy to find what you were looking for?
5. Were you expecting to see something that you did not?
6. How helpful was the navigation?
7. How helpful were the filters in the sidebar?

8. What did you think of the language used?
9. If you could change something on the application, what would you change?
10. Is there anything you would like to ask me about today's testing session?

- Ask participant to fill out survey.
- Stop the recording and save the file.

Thank you very much for your input today. You have helped us understand the usability of this application your answers and narrations during the activity scenarios. I appreciate your time.

# Appendix

## Survey Questions

1. How would you rate the ease of using this application?

Extremely Difficult	Moderately Difficult	Slightly Difficult	Neither Difficult nor Easy	Slightly Easy	Moderately Easy	Extremely Easy
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2. Did you experience any errors while using TripAdvisor?

- Yes (Go to Q3)
- No (Go to Q5)

3. If yes, was the error message intuitive for you to understand the problem?

- Yes (Go to Q5)
- No (Go to Q4)

4. If No, please explain in detail:

5. Overall, how satisfied are you with your experience?

Extremely Dissatisfied	Moderately Dissatisfied	Slightly Dissatisfied	Neither Dissatisfied nor Satisfied	Slightly Satisfied	Moderately Satisfied	Extremely Satisfied
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