REPIQ

RepIQ Usability Test

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April 2017

Introduction

RepIQ is a web application created to aid Sales Professionals in the discovery, research, and management of sales opportunities. RepIQ provides users with the ability to search for organizations using a variety of filter and sorting methods (examples include: location, size, and technologies). As organizations are identified, RepIQ also provides contact information for individuals at organizations for the user to contact directly. The purpose of this test is to determine how well users understand and interact with the core interactions of RepIQ's search functionality, while introducing a new feature (Lists) for managing organizations.

Summary

The RepIQ UX team conducted usability tests at the offices of various participants on April 7 and April 10, 2017. There was a total of 4 participants for testing from two different organizations. Typically, a total of 5 participants are involved in a usability test to ensure stable results. Due to time restraints and simplicity of the test, 4 was sufficient. Each individual session lasted approximately 30 minutes.

In general all participants found that the RepIQ website to be clear, "straightforward", "visually appealing", and easy to use. One of the participants was already a RepIQ user, and the remaining 3 were completely new to the product.

This usability test identified a few issues with the product, including:

- Lack of feedback when performing actions (Lists)
- Lack of visibility for key actions (Lists)
- Lack of guide/prompting of next action in a specific workflow
- Unexpected search filters behavior
- Unexpected search results display
- Confusing Data

This document contains the participant feedback, comments, task completion rates, time on task, errors, and recommendations for improvements. A copy of the scenarios and questionnaires are included in the appendix.

Test Objective

Tests are conducted to document how users perform specific tasks. The goal of the test focuses on answering the following questions:

- How easily and successfully do users understand the core search functionality of RepIQ?

- How effectively does the design communicate the intended workflow?

- Does the product's basic functionality have value to the user as a sales professional?

- What type of prerequisite information does a person need to use the product? Which functions of this product are intuitive and which will probably require either help or written documentation?

- How closely do users follow the designed path of the most common tasks?

- What are the main stumbling blocks for the user?

Methodology

Summative Usability Study – dev.repiq.com (April 7-10, 2017)

A summative usability test was conducted to measure and assess the effectiveness of the current state of dev.repiq.com, as of April 10, 2017. A usability test plan was developed to formalize the tasks, measures, and goals of the test.

1. Recruitment

A total of four participants were successfully recruited for this usability test. Users were not required to be existing users or new users, instead to have basic working knowledge of browsing the internet. Professionals with a bit of sales experience were preferred, but not required. Participants were recruited from within the network of RepIQ employees and all had experience with sales. Participants were compensated with gift cards for offering their time and participation in the study.

2. Participants

The usability test included 4 participants, 3 male and 1 female. Three of the participants were between 30-34 years of age, and one between the age of 25-29. All of the participants were college educated, holding Bachelor's degrees. All participants were experienced using a computer and the internet, with 3 preferring the Chrome web browser, and one preferring the Safari web browser.

3. Procedure

During the session, the test administrator explained the test session and asked the participant to fill out a brief background questionnaire (see Attachment A) before performing the tasks. Participants first read background and persona information, then the task scenarios, and then attempted to successfully perform each task.

After each task, the administrator asked the participant to provide feedback on the visual aesthetic of the interface and provide feedback on the task process overall. Task scenario measurements included (see Attachment B):
- **How quickly information was found on each page**
- **The rate of error for each action in a task**

- **The amount of times the participant needed assistance to complete an action**

After the last task was completed, the test administrator asked the participant to provide feedback on the tasks performed, the intuitiveness of the product, and any other comments about their experience including:
- **Ease of use**
- **Learnability of tasks/actions**
- **Information facilitation – how quickly participant could find information**
- **Look & feel of pages**
- **Site content and organization**

In addition, the test administrator asked the participants the following overall website questions:
- **What the participant found confusing**
- **What the participant found intuitive or easy**
- **Thoughts on specific actions during the tasks**
- **Recommendations for improvement.**

Tasks

User Persona

You are the top salesperson at your paper supply company, but you have struggled to find new customers and you heard about RepIQ at a recent sales conference. You have signed up and are using the site for the first time. You want to find small, local companies that use software that specializes in generating printable documents.

Task 1

You are seeking small, established companies (**employee size 11-50**) in **Chicago, IL**, and using the technology **Office365**. Perform a search specifying this criteria and choose the first company from the search results and add to your prospective list "XYZ".

When finished, return to the homepage (Click RepIQ logo in top left).

Task 2

From the homepage, find the company you just added to the prospective list "XYZ". Add this company to a new list. Name this new list "ABC Companies". When finished, return to the homepage.

Task 3

From the homepage, find the company named "**CRST International**". Once you have found this company, add CRST International to the newly created list from the previous task ("ABC Companies"). Navigate to "Lists" and select the "ABC Companies" prospective list to view all of the companies that you have recently added to the list.

See Appendix for questionnaire questions.
See Appendix for task measurement and interview questions.

Results

The usability test offered quantitative data from the test tasks and qualitative data was obtained from individual interviews. These results are categorized into a set of key findings of effectiveness below.

All participants successfully completed each task, although there were some errors and unexpected behavior for a few actions to perform each task. The tasks were deliberately simplified to see how the user would navigate the site from a fresh perspective. The test administrator only needed to assist the users a couple of times to successfully wrap up the task and did not have a huge impact on the findings.

Overview

Task	Total Time on Task (minutes)	Success Rate	# Errors
Task 1: Filter search results, Add to List	1:31.00	100%	0
Task 2: Search; Add to New List	1:03.75	100%	1
Task 3: Search; Add to List; Navigation	1:11.00	100%	4

Individual Time to Complete Performance

Task	P1	P2	P3	P4
Task 1: Filter search results, Add to List	2:00	2:00	1:15	0:49
Task 2: Search; Add to New List	2:00	1:42	0:16	0:17
Task 3: Search; Add to List; Navigation	0:50	2:20	0:58	0:36

See Appendix for complete task measurement and interview results.

Subsequent debriefing of participants found their experience with RepIQ to be favorable. All participants credited the site with a clean design. Participants also

thought the tasks were fairly straightforward and not too complicated. All participants shared that this was their first time involved with a usability test and had positive experiences. The users did express a few frustrations and suggestions for an improved user experience.

Findings and Recommendations

　　The following themes were identified during the tasks and interviews. Included with each item is the recommendation to mitigate the issue.

1. **Lack of feedback when performing actions (Lists)**

   Recommendation: Provide first-time and experienced users the appropriate prompts and feedback.

2. **Lack of visibility for key actions (Lists)**

   Recommendation: Main action features need more prominence. The ellipsis button display may make more sense as a generalized management option for common actions, but not main features (save, copy, delete, etc.)

3. **Lack of guide/prompting of next action in a specific workflow**

   One-time tutorial may be good to guide the user through specific workflows.

4. **Unexpected search filters behavior**

   Recommendation: Filters should collapse more intuitively, not be expanded by default. The location filter was displaying as expanded after a different filter had been selected, which was confusing for users. The page also unexpectedly jumped when making selections (may have been caused by filters being expanded by default)

5. **Unexpected search results display**

   Recommendation: The user was searching from the homepage and was getting unexpected results, so we should make sure the search suggestions are accurate to what the user expects. Example: "CRST" displays CRST International first, but when "CRST I" is typed, CRST International moves to fifth in the list.

6. **Confusing Data**

Recommendation: When the user was navigating the filters, there were often repeated results to select and was causing confusion. For example:
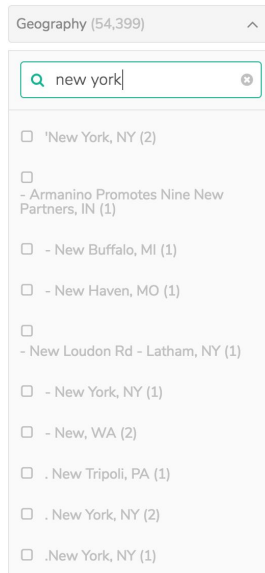
There were also repeated organizations for the search autosuggestions that slowed down how quickly the user could select a company. Example screenshot:
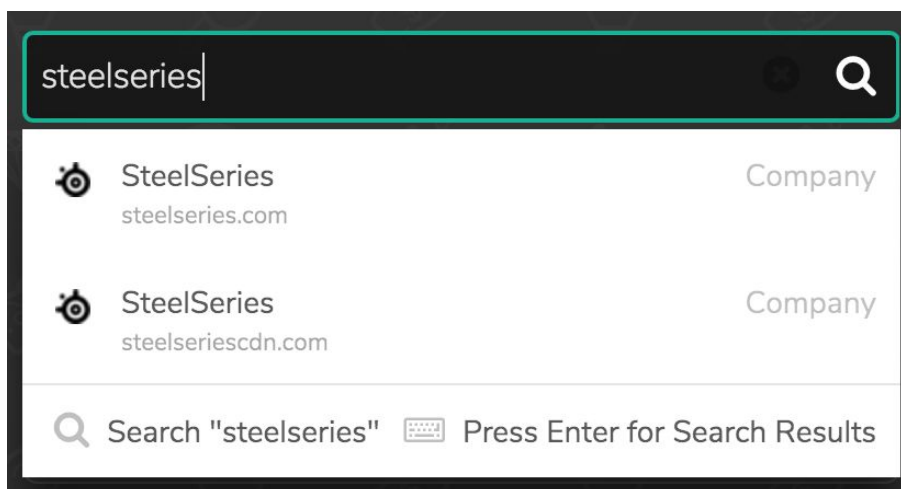
We Should make sure data is accurate and consistent. When searching some companies, there were also non-U.S. URLs displayed for the same company, which may cause confusion.

There were other minimal findings that were identified, but did not appear to be critical updates. A comprehensive list can be found on the following page.

Recommendations are found below with severity ratings. Severity ratings are based on the amount of time to complete task, error rate, mention of user frustration, and overall effect to user's experience.

Severity Scale

Low
Medium
High

Issue	General Overview	Recommendation
Action Feedback	lack of prompts and confirmation messages. when adding company to list, would want ability to jump straight to that list	Provide first-time and experienced users the appropriate prompts and feedback.
Actions Visibility	need to be able to find this easier	Main action features need more prominence. The ellipsis button display may make more sense as a generalized management option for common actions, but not main features (save, copy, delete, etc.)
Confusing Data	location search - multiple results for new york city ('new york, " new york, NY, new york city, NY)	Should make sure data is accurate and consistent. Various formatting of these strings seemed to be causing this.
Lists Landing Page	not clear how to select an individual list	We should reconsider using the current "All Lists" format as our Lists landing page. The format may need to be unique so the user can recognize some differentiation between the landing 'overview' page, and an individual list page.
Guide user more	Lists was a little confusing without context	One-time tutorial may be good to guide the user through specific workflows.
Unexpected autosuggestions	autosuggestions were not accurate when searching specific company (CRST International)	Make sure the search suggestions are accurate to what the user expects. Example: "CRST" displays **CRST International** first, but when "CRST I" is typed, **CRST International** moves to fifth in the list.
Search Filters	search filters unexpectedly collapsed/expanded	filters should collapse more intuitively, not be expanded by default; location filter getting expanded after a different filter has been selected was confusing for users; page unexpectedly jumped when making selections (may have been caused by filters being expanded by default)
Search Filters ("Tech")	"tech" was not clear what it was offering	should consider alternative text that explains what this means
Navigation Availability	when scrolling the page, it was frustrating that the user needed to scroll to the top of the page to access the navigation again	We should consider implementing a fixed header that moves in and out of view as the user scrolls the page. When the user is scrolling down, the navigation moves out of view, and when the user scrolls back up (or stops scrolling) the header is available again. This will give the user easier access to the navigation and faster access to other pages of the site.
Create List feedback	want to make sure list was created properly	Need confirmation feedback when completing this process
Create List autosuggestion	want to know if list already exists	Autosuggestions to user so they know if the list name is already in use

Conclusion

In general all participants found that the RepIQ website to be clear, "straightforward", "visually appealing", and easy to use. One of the participants was already a RepIQ user, and the remaining 3 were completely new to the product. The most common piece of feedback was the lack of feedback when completing actions during a task, with all four participants making mention of this either minimally or as a main frustration while using the product. Two of the new users had trouble locating action items during the task, so the visibility of main functionality is also important to address. One other concern brought up by participants was the inconsistency or unexpectedness of some data while performing tasks. All in all, the participants had positive feedback for the product and were excited to see how it progresses as a useful tool for sales professionals.

Appendix

Log Sheet. Includes task records and interview responses.
https://docs.google.com/a/repiq.com/spreadsheets/d/1RHsGzyIfK3lJTlHJ4D11cd9Bs
Peq2i52M10MhwSZ308/edit?usp=sharing

Participant Questionnaire Responses
https://drive.google.com/a/repiq.com/file/d/0B7cF7wGHqn7XV3psRzhDWXFHYUU/vie
w?usp=sharing