Usability Test Plan

{Project: Account Directory Explorer}
{Link to Findings: 📗 **(UX) Usability Test Findings Template (alex poole}**

Executive Overview

Scope

- What's being tested?
    - We are testing the MVP features of the prototype for the Accounts Directory Explorer
- What's the user journey of what's being tested?
    - The user will perform the following tasks:
    - **Search** for a Lead Seller in the Medicare space, the lead seller must be following the CMS Guidelines and have the TrustedForm certificate
    - **Add** the business partner as a Connection
    - **Send a Message** to the business partner they chose
    - **Follow Up** in the Messages area of the Explorer
- Why are we conducting a test?
    - We need a way to test the assumptions and the data that we gathered from the previous round of User Research. The usability test can tell us in detail what is working well and what needs improvement.
    - To look at what the user does and compare it to what they said.

Test Objectives

- What are the goals of the usability test?

    - Learn if there's anything that is missing in the designs that would improve usability

    - Observe how the user moves across the UI and how intuitive it is for him to perform the given tasks

- What specific question will be answered? (usability test example)

  -How easy it is for a user to find and connect with potential business partners, and also to discover new potential connections within the space

- What is the hypothesis?
  - We believe that finding new relevant business partners but also connecting with them will bring a lot of value to the users. Based on what will be observed in the usability test we can determine what they need the most and what features should be prioritized.

Logistics

List of Participants

Alex Poole

- Lead Buyer
- Expert in the Medicare space and current Lead Conduit & Trusted Form user.
- account type contractual
- Digital Marketing Director
- apoole@quantum3media.com
- Quantum3 Media
- Jennifer Gregory

Alex works for Quantum 3 Media as the Director of marketing. He is a buyer and has been using LeadConduit for over 3 years (super user).

Team Roles*

Design team member conducting the usability test:

Erick Hernandez (UX Manager) - Guido Interlandi (UX Designer)

Design team member documenting the responses

Erick Hernandez (UX Manager) - Guido Interlandi (UX Designer)

Prototype

https://www.figma.com/proto/OXFaLpGE1RddDCkgTqC6cQ/Accounts-Directory?type=design&node-id=361-31074&t=0dbcSvsOskupxwzq-1&scaling=min-zoom&page-id=0%3A1&starting-point-node-id=2%3A2647&mode=design

Scheduling Calendar

Calendar Link: https://us02web.zoom.us/s/6908954908

Link to Deliverables

Findings Excel Link: (UX) Usability Test Findings (Alex Poole)

Video Recording Links:
https://us02web.zoom.us/rec/share/lN1ZumrXrpbkBTQnnk8GY9k7fo3MZAx9ENEw2WBUpTYsUVe2f3qMRh1cUD0xRyk.jS-peFoq8BRhcOES?startTime=1699556623000

Passcode: *Pe5D&rC

Presentation (if applicable)

Intro

Hello Alex! Thank you for joining this session.
We have scheduled this session to run approximately 45 minutes. Before we start, I'll explain the setup and explain how the session works.

What we're doing today

I'm responsible for conducting some user research on the ActiveProspect new accounts directory. We're trying to identify areas of improvements to make the platform easier to use. And to do that we're talking to people like you, and based on your feedback we're hoping to pinpoint areas for improvement.

Room setup

Let me explain the setup
I'll be asking you questions and talking you through the tests
_____ will be observing and taking notes
We will record the session for note-taking purposes but the footage will not be seen by anyone outside the team.

The Usability Test

The session will consist of two parts. We will have an initial interview (*we will skip the interview part as we already have interviewed Alex recently*) and then I will ask you to perform some tasks with the prototype of the Accounts Directory Network.

The prototype might look real, but because it's just a prototype, not all the buttons and links will work. You can use the blue highlighted guide areas to determine which areas of the screen are interactable. These appear when you click on any area of the prototype. Additionally, I will guide you through the steps of a scenario.

The Scenario

For the purposes of this test, we will assume the following:

You are the Marketing Director of a Customer Acquisition company, you have been struggling to find new medicare leads and so you are on the lookout for a Lead Seller that follows the CMS guidelines. Compliance is key but you are also interested in connecting with potential business partners that might grow in that area later.

The Tasks

What we want you to do is:

-Find Network of potential partners

-Find a Medicare Lead Seller which follows the CMS Guidelines.

-Send them a message.

-Find a Medicare Lead Seller which does not follow the CMS Guidelines yet.

- Add them as a connection.

(Tester's expectations)

For the sake of accuracy of this usability test, I won't be able to help you when you get stuck and I can only answer your questions after the session. It might seem like we are testing you, but we are not.

Our goal is to test the product, not you. There are no wrong and right answers and all feedback is welcome. It will also help us greatly if you think aloud on everything you do.

(Permission to record)

We would like to make a video recording of this testing session. It's just for internal use—nothing will be shared without your permission. Will this be ok?

> ⚠️ Press the "Record" button.

Intro - Interview (already done)

For reference check the following links: 🟩 *01 User Interviews for AP Directory* &
📄 *InDepth Interview Script*

❗ *Make sure you try to find the answers to the below questions beforehand.*

- What is your position?
- What are your main work responsibilities?
- Please describe your typical working day.

(Connection with the project)

- How do you usually <e.g., create a flow>?
- How often do you <e.g., check your flows>?
- When was the last time you <e.g., created a report of your leads>? Please explain your process.
- What are your main issues with <process>?
- What do you find useful in <product>?

(Screen sharing & record)

- Thank you for your detailed answers and for sharing insights into <something concrete from the answers>. Now we can start with the usability test.
- Can you please share your screen? I will send you a link for the prototype.

Task Prompt

List the tasks that the users will be completing on the prototype. Formulate tasks in various manners to help push the users when they are stuck or do not talk out loud.

1. The user will perform the following tasks:
2. **Search** for a Lead Seller in the Medicare space, the lead seller must be following the CMS Guidelines and have the TrustedForm certificate.
3. **Add** the business partner as a Connection

4. **Send a Message**
5. **Follow Up** in the Messages area of the Explorer
6. <Backup questions> In case a user doesn't explain their actions. <e.g., What will you do next? What did you expect to see? What did you want to achieve by clicking on <button>?>

Create a Google Sheet to document the findings. Paste the above prompts for each participant.

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[1]User Feedback

Gather general feedback & thoughts from participants. What worked and what didn't work?

- What was your overall impression of the directory?
- Does it meet your expectations?
- Do you feel there is anything missing?
- Are you confused or frustrated with any of the elements?
- Do you feel the design addresses your main goal for searching and connecting with business partners?

Outro

(Words of gratitude)

- Thank you for sharing so many ideas, pieces of feedback, and insights. It was especially valuable to learn about <something concrete> and understand better how you <some finding from the testing>.

(Next Steps)

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[1]

- The team will use what we have learned today to improve the <feature/project/product> and will take it into account in further developments.
- Feel free to reach out to us if you recall something or come up with additional ideas.
- Would you be open to participating in other usability tests in the future?
  - ⊞ UX Candidate Contact List