Usability Test 1

Name of product being tested
Chetohs CRM

Usability test goals
- Evaluate whether users understand how to navigate the CRM.   - Identify main barriers for participants whilst doing main CRM tasks.

User profile(s)
Tech-competent users who have worked with clients freelance or are familiar with how freelance work functions.

Global questions	Hypotheses
- Do users understand the purpose of the CRM within seconds of logging in? - To what extent does the CRM meet user needs? - Do users encounter barriers when searching or filtering clients? - Do users encounter barriers when utilising profiles? - Do users encounter barriers when creating a new contact? - Do users encounter barriers when editing their information? - What adjectives do users use to describe the design?	- It is easily to understand that the Chetohs CRM stores clients for a freelancer. - Users will be able to easily search and filter clients. - Users will understand how to navigate to and from profiles. - Users will be able to create contacts. - Users will be able to edit their information easily.

Initial questions
What is your age?   - 27   What is your gender?   - Female   What is your occupation?   - Bioinformatician   If you were working freelance, what kind of system would you use to organise your customers?   - My phone contacts

Scenarios

Scenario 1	"Imagine that you have been given this web app"
Task 1	Start the site, watch for 5 seconds, and tell us what it is about/used for.

Task questions	What do you think you can do with this site? - A contact storing site - Give contacts progress and priority statuses What adjectives would you use to describe the design? - Clean - Simple - Pleasant

Scenario 2	**"You want to search for client Dulapeep Johnson"**
Task 2	Locate this client in the CRM.
Task questions	How was the experience of searching for this client? - Straightforward - Enjoyed the autosearch - Very easy

Scenario 3	**"You want to look for high priority and new clients"**
Task 3	Attempt to find a way to see these clients in the CRM.
Task questions	How easy or difficult was it for you to work out how to find things based on these factors? - Pretty easy, filter button made sense - Selected stuff nicely What were your feelings on the filter and how it worked? - Worked fine and as expected

Scenario 4	**"You want to create a new contact"**
Task 4	Open up the main page, navigate to where you'd create a contact and make one.
Task questions	How easy or difficult was it for you to find where to create a contact? - Quite easy - Menu button made sense How was the experience of creating a contact?

	- Several fields to fill in but good to have detailed info - Overall good experience

Scenario 5	**"You want to edit your email address"**
Task 5	Locate where you can do so, and update your email address.
Task questions	How easy or difficult was it for you to find where to edit your email? - Easy - Used menu button again, and remembered that setting-type things were in this menu How was the experience of editing your email? - Very simple - Save changes button was easy to use

Scenario 6	**"You want to access Jenny Doe's profile and change her priority'"**
Task 6	Locate Jenny Doe's profile and update her priority.
Task questions	How easy or difficult was it for you to find Jenny's profile? How about her priority? - Simple - Grey hover on name made it easier - Priority was clear on profile How was the experience of editing her priority? - Easy - Liked the dropdown, made it quick

Scenario 7	**"You want to edit Jenny Doe's company name"**
Task 7	Locate where you can do so and change Jenny's company name.
Task questions	How easy or difficult was it for you to find where to edit Jane's company name? - Easy - Better way to save might be useful but edit pencil made sense

Scenario 7	**"You want to log out of the CRM"**

Task 7	Locate where you can do so and sign out.
Task questions	How easy or difficult was it for you to find where to logout? - Medium - Logout is only on main page, maybe would be good to have on profile page

Final questions

To what extent does the main page meet your need?
- Meets all my needs

To what extent do profile pages meet your need?
- Meets all of my needs, very detailed

To what extent does edit information meet your need?
- Meets my needs very well, don't need to edit anything else

To what extend does add contact meet your need?
- Mostly meets my needs
- Could be a bit shorter, less info

Would you recommend the CRM to a friend or relative?
- Definitely!