Jacob McMahon and Justin Gim Ho Cheung

1. Introduction

Hello, how are you? Thank you for joining me today, we are going to walk through a few tasks inside our CRM tool designed for managing leads, appointments, and client information.

Thank you for participating in this usability test. Today you'll be interacting with an early prototype of a CRM tool. The purpose of this session is to understand how intuitive the layout, navigation, and workflow are — not to test you. There are no right or wrong answers.

This prototype is not fully functional. Visual elements represent layout and flow, but only the buttons are clickable. Text fields, dropdowns, or inputs will not work, so you'll simply tell me what information you would attempt to type or select as you move through each step.

As you use the tool, I will occasionally guide you forward along the intended path, especially in cases where form inputs would normally drive the next screen.

As you work through the tasks, please think out loud. Tell me what you expect to happen, what you're looking for, and anything that confuses you.

Do you have any questions before we begin?

2. Background

YES/NO Answers Only

Have you ever used a crm tool before?

Do you know what a crm is?

Any experience in sales, logistics, secretary work, business management?

How comfortable do you feel navigating new apps?

3. Tasks

Task 1:

Scenario:

You've just downloaded this tool for the first time because you want to use it to manage customers for your small business.

Goal:

Get yourself set up with an account so that you can begin using the app.

You'll know you've achieved this once you reach the screen where the main features of the app are available.

Notes:

Task 2:

Scenario:

You're already logged in and working on your normal daily tasks. One of your clients, Deric, contacts you and says he no longer wants to receive payment reminders.

Goal:

Update Deric's settings so that he no longer receives payment reminders from you.

Notes:

Task 3:

Scenario:

You just spoke with a new potential customer and want to record their information in the system so you don't lose track of them.

Goal:

Create a new lead and stop once you reach the place where lead details would be entered.

Notes:

Task 4

Scenario:

You're reviewing your team's workload and notice that a team member, John Kim, is currently assigned to the wrong person. You want to update who is responsible for John.

Goal:

Change John Kim's assigned person from Justin to Jake.

Notes:

4. Debrief - wrap-up questions and gather final feedback

Rate each task on how easy it was on a 1-5 scale. Describe each tasks ease of use.(5 being the easiest and 1 being the hardest) Answer this question for each tasks.

Did anything about any interfaces confuse you at all?

Did the app work the way you expected?

Was the layout easy to understand?

What stood out to you right away?

Is there anything that you thought was going to do one thing and did another?

Is there any thoughts you'd like to share that came up?