

# crunchbase Usability Study

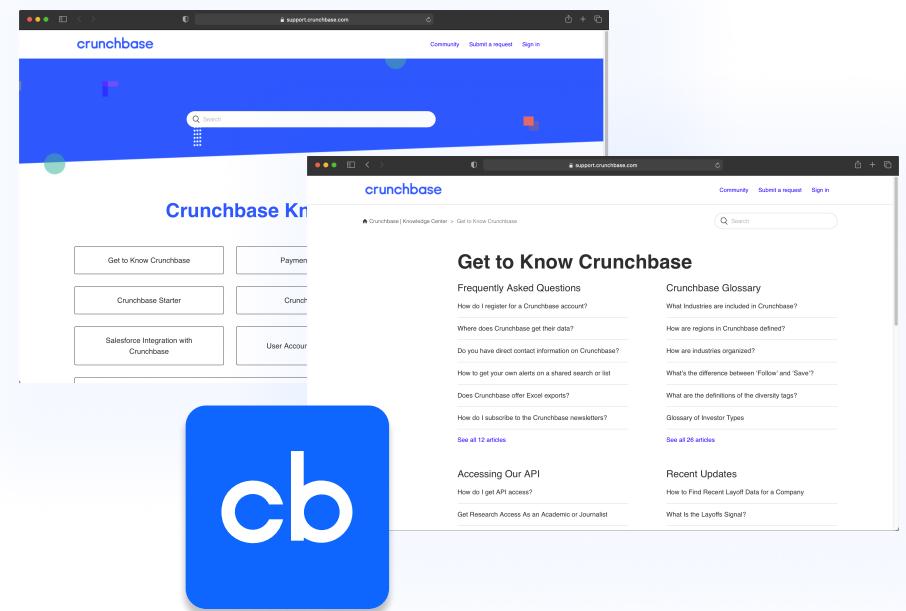
Anders Herberg

Andoniah Carmeline

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Elaine Yuanyi Zhou

**HCDE 517B • Winter 2021**



# Overview



# Our Research Team



**Anders**



**Adoniah**



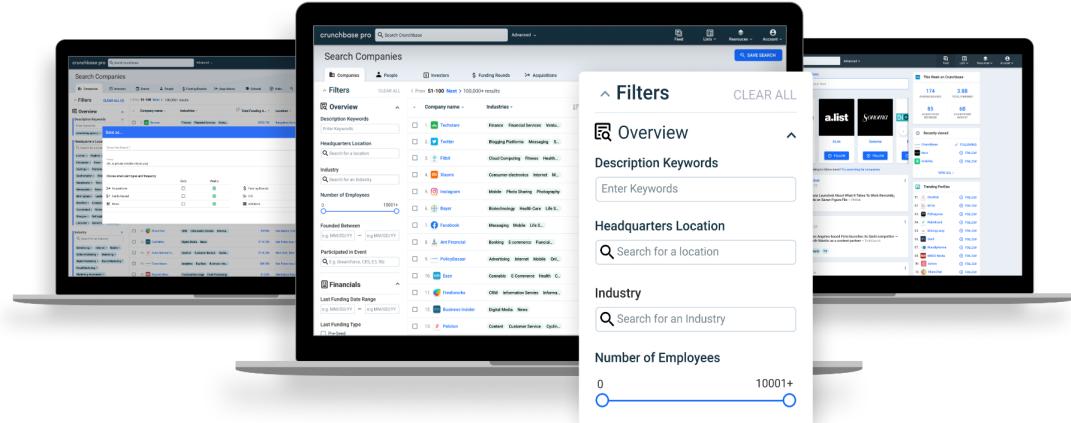
**Claire**



**Elaine**

# About Crunchbase

Crunchbase is the **leading platform for professionals to discover innovative companies**, connect with the people behind them, and pursue new opportunities.



“Discover innovative companies and the people behind them.”

# Product

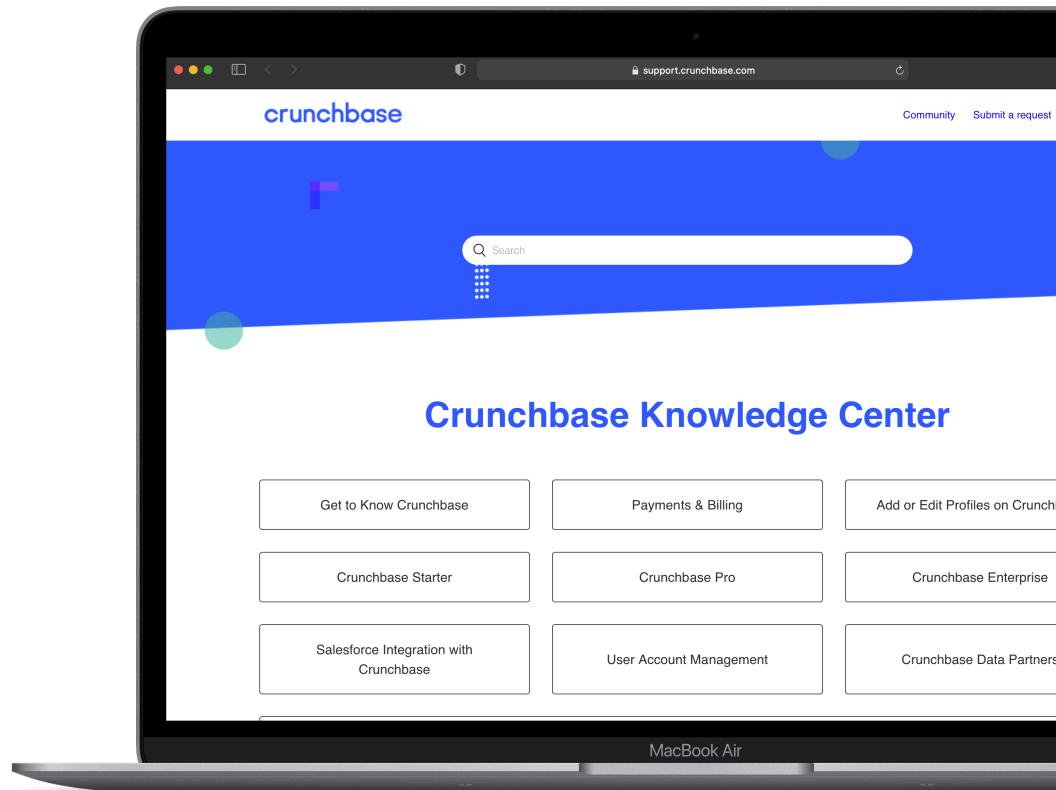
## Crunchbase Knowledge Center

### Our Focus

The **information architecture** of Crunchbase's **Knowledge Center**; the support page for users to learn about offerings, services, and troubleshooting.

### Why?

Users are **having difficulties navigating** the Knowledge Center, impacting their ability to access important information easily.



# Target Personas



## Investors

Find investments, conduct market & industry research, promote organization



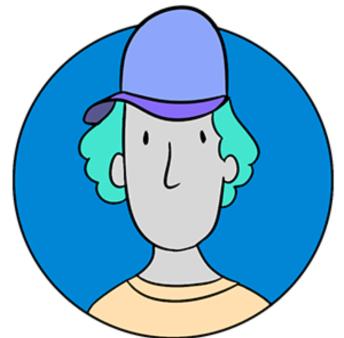
## Salespeople

Find prospects, conduct company-specific research, conduct market research



## Marketers

Find prospects, conduct market research, conduct company-specific research, promote organization, track companies



## Founders

Find investors or prospects, conduct market & industry research, promote organization, enrich algorithm/product

# Research Questions

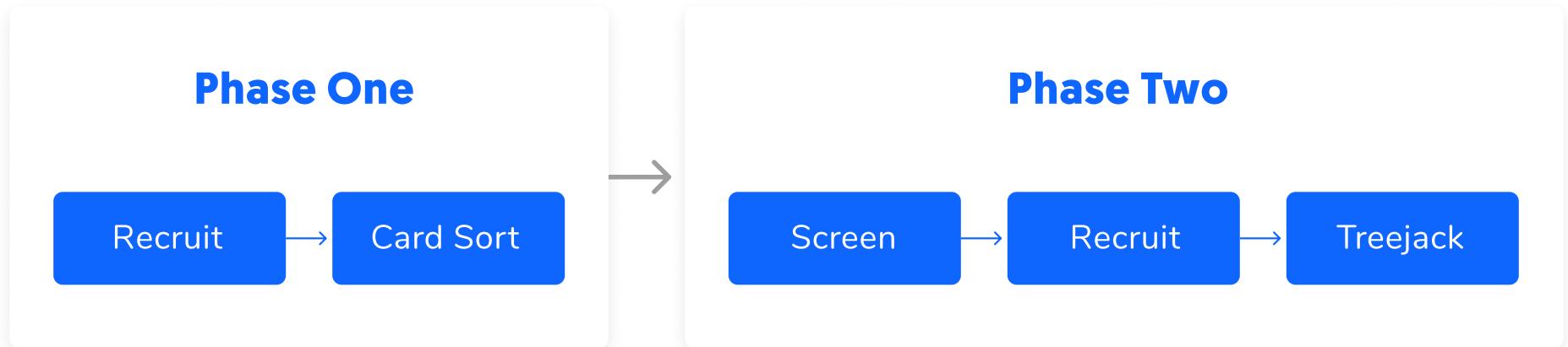
1. Are the current Knowledge Center articles **categorized similar to users' perceptions?**
2. Can users **successfully navigate to specific content** in the Knowledge Center?
3. What **options do users want to see** when browsing the Knowledge Center?
4. Can users **recover from errors they encountered** while navigating the Knowledge Center?



# Research



# Methods Overview

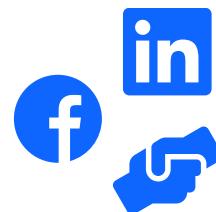




## Phase One • Quantitative



58 participants



Recruited via  
LinkedIn, Facebook &  
personal connections



Method:  
**Hybrid Card Sort  
(Unmoderated)**

10 pre-made categories  
49 cards (Article titles)

# Why Unmoderated Card Sort?

Useful for **assessing information architecture**

Helps **track users' mental models**

**Convenience** - collect a lot of data in a short amount of time





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# Card Sorting

**OptimalSort**

View Instructions Leave a comment Printed

Marketly Pro Subscription	User Account Management	Get to Know Marketly	User Data & Privacy	Salesforce Integration	Marketly Enterprise Subscription
0 items	0 items	0 items	0 items	0 items	0 items
▼ Other	▼ Marketly Data Partners	▼ Payments & Billing	▼ Add or Edit Profiles		
0 items	0 items	0 items	0 items		

How do I cancel my Marketly Pro Subscription?  
How do I filter by pre-money valuation?  
What are the requirements to create a Marketly partner?  
Where does Marketly get their data?  
What is a drill-in?  
What are the requirements to edit a profile?  
Why can I only see 1,000 results?  
Is there a monthly subscription option for Marketly Pro?  
How are regions in Marketly defined?  
How do I manage my Marketly Pro subscription?  
How has Marketly prepared for GDPR compliance?  
How do I build a search?  
Is there a glossary of funding types?  
What industries are included in Marketly?  
How do I add Diversity Spotlight data to Marketly?  
Where can I find my receipt?  
What do I do if I'm getting a payment error?  
What is Marketly Pro with Data Board?  
How do I request to deactivate my user account?  
49 of 49 remaining

**OptimalSort**

View Instructions Leave a comment Printed

Marketly Pro Subscription	User Account Management	Get to Know Marketly	User Data & Privacy	Salesforce Integration	Marketly Enterprise Subscription
How do I cancel my Marketly Pro Subscription? How do I filter by pre-money valuation? What are the requirements to edit a profile? How do I build a search? What do I do if I'm getting a payment error? What is Marketly Pro with Data Board? How do I get API access? Why are my edits not appearing? How do I add a funding round? How do I connect my Marketly information on Yahoo Finance? How do I request a password reset? What types of searches can I build? Can I try Marketly Pro for free? 3 items	How can I only see 1,000 results? How do I set up and manage my events? What industries are included in Marketly? Is there a monthly subscription option for Marketly Pro? How do I manage my personal data? How does Marketly prepare for GDPR compliance? What information can I remove from a profile? Why am I unable to import a list? Where does Marketly get their data? What cities are in the Dallas/Fort Worth region? How do I register for a Marketly account? How much does Marketly cost? What is a drill-in? What are the differences between searches and filters? How do I add Diversity Spotlight data to Marketly? How do I manage my Marketly Pro Subscription? 5 items	How do I resign my subscription? What are the requirements to create a Marketly profile? Is there a monthly subscription option for Marketly Pro? How do I manage Marketly use personal data? How does Marketly prepare for GDPR compliance? What information can I remove from a profile? Why am I unable to import a list? How do I get research access as an academic or journalist? What is the difference between a free Marketly account, Marketly Pro, and Marketly Enterprise? Does Marketly give access to my Salesforce data when leveraging the Salesforce integration for Marketly Enterprise? How do I update my email preferences? How do I request to permanently delete my user account? How do I add a founder? How are regions in Marketly defined? 6 items	Where can I find my receipt? Does Marketly offer Excel exports? How does Salesforce integrate with Marketly? Can I upgrade from Pro to Enterprise? How do I request to deactivate my user account? 2 items	Where do I update an employee from current team to past? Do you have direct contact information on Marketly? 2 items	When does my subscription renew? What's the difference between Pro and the API? 2 items

14 of 49 remaining

Program: Optimal Workshop



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## Phase Two • Qualitative

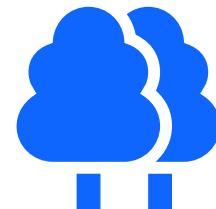


7 participants



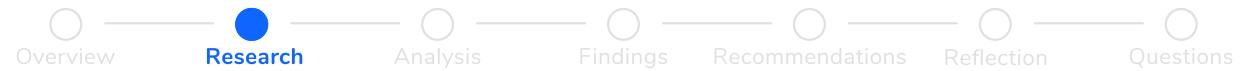
Screened from  
Card Sort

3 Founders    2 Marketers  
1 Investor    1 Salesperson



Method: Tree Test  
(Moderated)

30 - 45 minute sessions  
5 Scenario-based tasks



# Why Moderated Tree Test?

Great way to **follow-up** after card sorting

Track how **mental models** perform in real-world scenario

Allowed us to **get valuable insight** from participants thinking-aloud



# Tree Test (Treejack)

**Task 1 of 5** [Skip this task](#)

For your first scenario, you want to register for a Marketly account. Where would you go to find the article titled "How do I register for a Marketly account?"

Marketly Knowledge Center

- Get to Know Marketly
- Payments & Billing
- Add or Edit Profiles
- Marketly Pro Subscription
- Marketly Enterprise Subscription
- Salesforce Integration
- User Account Management
- Marketly Data Partners
- User Data & Privacy
- Other



**Task 1 of 5** [Skip this task](#)

For your first scenario, you want to register for a Marketly account. Where would you go to find the article titled "How do I register for a Marketly account?"

Marketly Knowledge Center

Get to Know Marketly

- Do you have direct contact information on Marketly?
- Does Marketly offer Excel exports?
- How are regions in Marketly defined?
- How do I build a search?
- How do I create a list?
- How do I get research access as an academic or journalist?
- How much does Marketly cost?
- What are the differences between searches and lists?
- What industries are included in Marketly?
- What is the difference between a free Marketly account, Marketly Pro, Enterprise, Applications, and Marketplace?
- What types of searches can I build?



**Task 1 of 5** [Skip this task](#)

For your first scenario, you want to register for a Marketly account. Where would you go to find the article titled "How do I register for a Marketly account?"

Marketly Knowledge Center

Get to Know Marketly

How much does Marketly cost? → I'd find it here

Program: Optimal Workshop



# Task Examples

**Task #2:** In this scenario, it is very important for you to know [how Crunchbase collects the information](#) that you see on company profile pages. Where would you go to find the article titled "Where does Crunchbase get their data?"?

**Task #5:** For your final scenario, suppose you [want to sign up for a paid service on Crunchbase](#), but you don't know the price. Where would you go to find the article titled "How much does Crunchbase cost?"?

Overview      Research      **Analysis**      Findings      Recommendations      Reflection      Questions

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# Analysis





# Card Sort: Data

## Data collected:

How users grouped cards in different categories

Which cards were most frequently grouped together

New categories created by the users

## Why this Data?

To see how users understand different concepts or ideas

Increase the discoverability of articles on Crunchbase's Knowledge Center

Improve how users interact with Crunchbase Knowledge center



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# Card Sort: Analyze

## How we analyzed it:

How users categorized cards

How often a card was **added into the same category** by users

How often were **cards grouped together** by users i.e. put into a category together

How **similar or different grouping** was compared to the actual website



# Tree Jack: Data

## Data collected:

Users thoughts and feeling through **Think-aloud exercise**

How users **navigate through the categories**

Why users chose a particular category

The **patterns in users' behavior, and thoughts**

## Why this Data?

To evaluate the **discoverability** of topics

To test the **categorization** in cardsorting

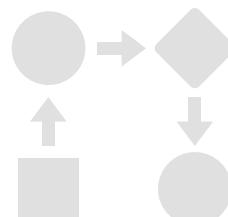
To **find patterns in user behavior and thoughts**

# Tree Jack: Analyze

**How we analyzed it:**



First clicks



User journey flow maps



Follow-up interviews

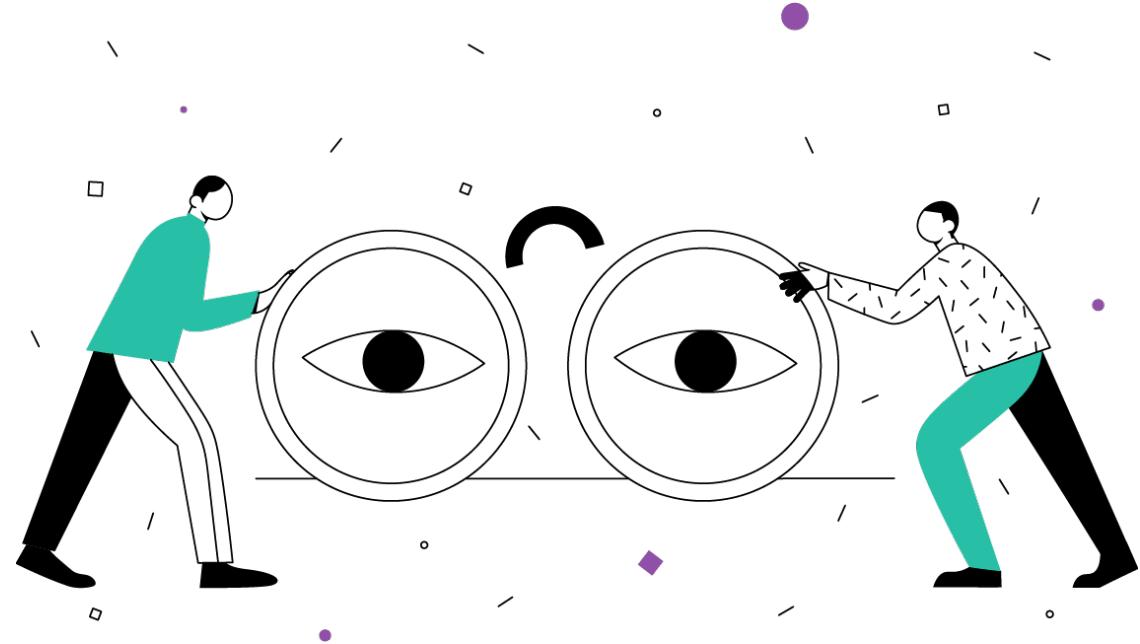
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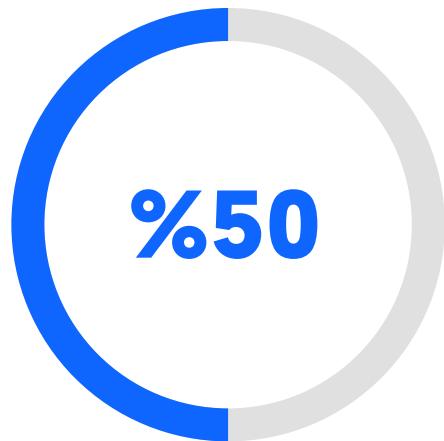
# Findings





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# Card Sort: Actual v. Perceived



Articles sorted into different categories than currently in the Knowledge Center

Article Name	Actual Category	% Chosen	Sorted Category	% Chosen
How do I manage my <b>Crunchbase Pro</b> subscription?	User Account Management	0%	<b>Crunchbase Pro</b>	62%
How do I set up and manage my alerts?	Crunchbase Pro	0%	User Account Management	48%
How does <b>Salesforce integrate</b> with Crunchbase?	Get to Know Crunchbase	6%	<b>Salesforce Integration</b> with Crunchbase	72%
How do I request to deactivate my <b>user account</b> ?	User Data & Privacy	6%	<b>User Account</b> Management	57%
Does Crunchbase get access to my Salesforce data when leveraging the <b>Salesforce Integration</b> for Crunchbase Enterprise?	Crunchbase Enterprise	10%	<b>Salesforce Integration</b> with Crunchbase	58%

We observed patterns where participants affiliated article titles with categories that shared keywords (EX: "Crunchbase Pro", "Salesforce", "Account")



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# Card Sort: Similarity

Observed patterns again  
when participants paired  
articles based on title

Card 1	Card 2	Similarity score	Grouped together on website?
What are the requirements to edit a profile?	What information can I remove from a profile?	79%	YES
How do I build a search?	How do I create a list?	65%	YES
What are the differences between searches and lists?	How do I build a search?	62%	YES
How do I request to permanently delete my user account?	How do I request a password reset?	60%	NO
How do I create a list?	Why am I unable to import a list?	60%	YES
How do I manage my Crunchbase Pro subscription?	Is there a monthly subscription option for Crunchbase Pro?	60%	NO
How do I manage my Crunchbase Pro subscription?	How do I cancel my Crunchbase Pro subscription?	60%	NO

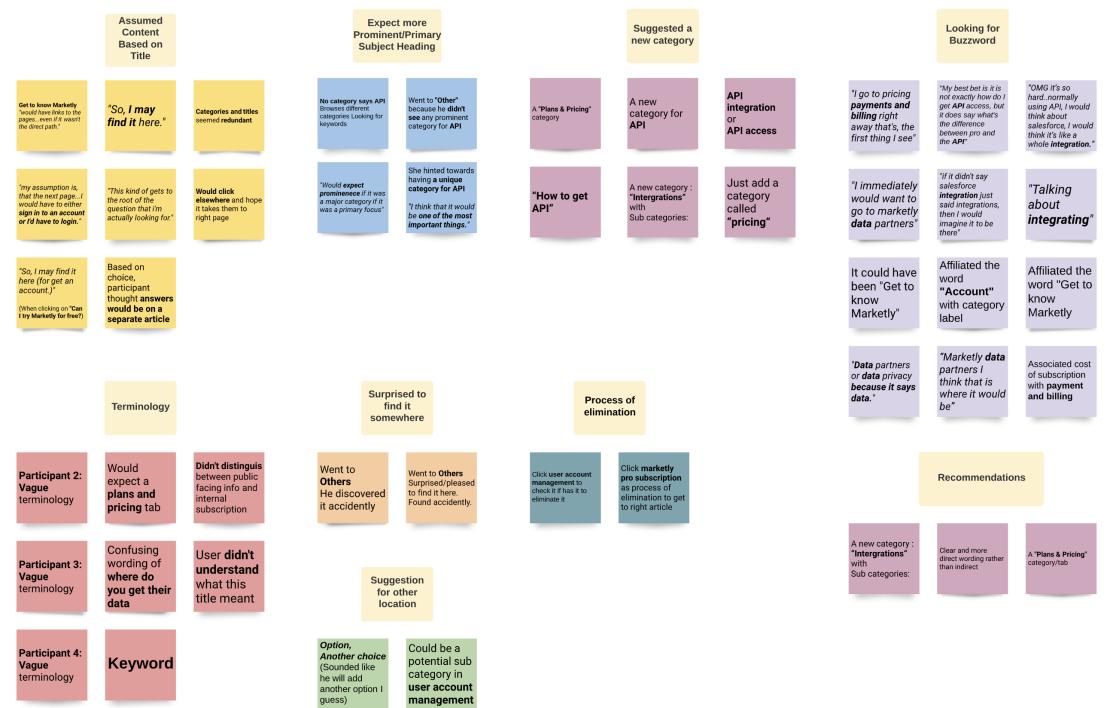
# Tree Test: Key Patterns

## Key Patterns

### 1. Terminologies

### 2. Suggest new categories

### 3. Assumed links would have answer





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# Recommendations





# Tree Test: Quotes

## Keywords & Phrases

**"Data partners or data privacy because it says data."**

(When searching for "Where does [Crunchbase] get their data?")

**"These two sections right over here, which is '[Crunchbase] Data Partners' and the 'User Data and Privacy'"**

(When searching for "Where does [Crunchbase] get their data?")

## Suggested Categories

**"None of the other categories were relevant to the API access."**

(When searching for "How do I get API access?")

**"Most websites have a plans and pricing tab where you can see different features and prices in tabular form. So I suggest a 'Plans & Pricing' category"**

(When searching for "How much does [Crunchbase] cost?")



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# What We Recommend

## Terminology & Categories

1. Use **direct phrases or terms rather than questions** to avoid confusion
  
2. Avoid titles with **keywords and phrases** unless they are in a category with those keywords and phrases





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# Reflection





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# Our Reflection

## What went well? 😊

1. Number of participants
2. Found participants within our target personas
3. Consistent findings & patterns
4. Great & helpful sponsor, Jeffrey Wong

## What to change? 😥

1. Recruitment screening (data spamming, data cleansing)
2. Do a closed card sort and not a hybrid card sort to avoid non-standardized categories



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# Limitations



Virtual Setting



Bias in first click



Time constraints



Number of articles tested



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# Future Research

1. Card sorting test with a **control, closed, and open method** to gather more comprehensive data
2. Testing participants **on the actual Knowledge Center**; not a simulator
3. Testing the **content of a article and matching their titles**
4. Testing **on actual Crunchbase users**





Overview



Research



Analysis



Findings



Recommendations



Reflection



Questions

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# Questions?

