

Appendix – Usability Testing Resources

Sample screener

Participant # _____

Financial services - employer screener (PRESIDENT/PARTNER/OWNER/BENEFIT ADMIN OR CFO)

Good Morning / Afternoon / Evening, My name is _____ and I'm working for _____. We would like to know if you would be interested in helping us evaluate a Web site. The session will take approximately a half hour and we will give you \$_____ for your time. The study will be held in Minneapolis on October 23rd. You will be asked numerous questions about your work benefits and will then be asked to evaluate a Web site. You won't receive any sales or marketing follow-up calls and your identity will be held as confidential information.

May I ask you a few questions? ☐ Yes ☐ No

Gender: ☐ Female ☐ Male

Into which of the following ranges does your age fall?

- ☐ 18-24 years or younger (Thank and DISCONTINUE)
- ☐ 25-40 years
- ☐ 41-54 years
- ☐ 54 years or older (Thank and DISCONTINUE)

Do you or does any member of your household work for an advertising agency, market research company or public relations agency?

- ☐ Yes (Thank and DISCONTINUE)
- ☐ No (CONTINUE)

Do you or does any member of your household work for a Web development-consulting firm, multimedia company, or work as a Web designer for businesses or e-commerce businesses?

- ☐ Yes (Thank and DISCONTINUE)
- ☐ No (CONTINUE)

Do you or does any member of your household work in the financial services industry?

- ☐ Yes (Thank and DISCONTINUE)
- ☐ No (CONTINUE)

Have you participated in any market research studies in-person, such as panel discussions or focus groups, in the last 9 months?

- ☐ Yes
- ☐ No (CONTINUE)

If no, skip following question:

In the last 9 months, have you ever participated in any market research studies on Internet applications or financial services?

- ☐ Yes (Thank and DISCONTINUE)
- ☐ No (CONTINUE)

What is your current job title? _____

(Looking for **PRESIDENT / PARTNER / OWNER / BENEFIT ADMIN / CFO**)

How many employees would you estimate are in your company? (Try to get a mix)

- ☐ Less than 10 (Thank and DISCONTINUE)
- ☐ 10 – 50 employees
- ☐ 51 – 99 employees
- ☐ 100 – 249 employees
- ☐ 250 – 500 employees
- ☐ Over 500 employees (Thank and DISCONTINUE)

Which, if any, of the following benefits does your company offer?

- ☐ Medical Insurance
- ☐ Profit Sharing
- ☐ 401K Plan (if not marked, Thank and DISCONTINUE)
- ☐ Dental Insurance
- ☐ Eye Care Insurance
- ☐ Life Insurance
- ☐ None of the Above (Thank and DISCONTINUE)

Do you play any roll in researching/deciding which benefits plan will be offered in your company?

- ☐ Yes (CONTINUE)
- ☐ No (Thank and DISCONTINUE)

Do you own or have access to a computer?

- ☐ Yes ☐ No (if no, thank and DISCONTINUE)

How would you rate your computer skills?

- ☐ Beginner (Thank and DISCONTINUE)
☐ Intermediate
☐ Advanced
☐ Expert

How many hours per week do you use a computer?

- ☐ Less than 1 hour
☐ 1 hour to less than 4 hours
☐ 4 hours to less than 10 hours
☐ More than 10 hours.

Do you use the Internet at home or work?

- ☐ Work ☐ Home ☐ Both ☐ Neither (if Neither, Thank and DISCONTINUE)

Informed-Consent Form

Formal

(Sample wording. Use a version approved by your company's legal counsel.)

I, _____, freely and voluntarily consent to participate in a product evaluation under the direction of (company name) of (location).

I understand this evaluation will involve using a product for research purposes and I am providing information to help in the further development of this product.

I understand that my participation in this evaluation is completely voluntary. I also understand that I may withdraw my consent and discontinue my participation at any time without penalty or prejudice to me.

I authorize (company) to use the findings from this evaluation, with the provision that my name will not be associated with any of the results, for release to industry sources, publications and advertisers in reference to the product.

I have been given the right to ask any questions concerning the procedures to be employed during this study. I have read and understand the foregoing and understand that I may receive a copy of this form.

Video Recording Release

I understand that the video recording made during the study will be used for research and development only and will never be presented to any broadcast media. I give my consent to (company) and its client to use my voice, verbal statements, and picture for research purposes.

(Print Name)

(Social Security Number –
if receiving a check)

(Signature)

(Date)

Sample Rating Scale

Example 1

	Strongly Disagree				Strongly Agree		
	1	2	3	4	5	6	7
Overall, this Web site is:							
• Easy to learn							
• Easy to use							
• Easy to understand							
• Simple							
• Useful							
It was easy to find:							
• Activities for students							
• Calculator instructions							
• FAQs							
• Support for IT products							
• How to buy IT products							
• Math projects							
Other opinions:							
• This site will help me accomplish my goals							
• It will save me time							
• I understood where I was in the Web site's structure							

• It seemed logical							
• It had the right number of features							
• It used familiar terms							
• It looked professional							
• I would use this Web site							

Sample Rating Scale (continued)

Example 2

Web site and Product Ratings

a) Opinion of the Web site

For each of the following, please check the box that best represents your opinion of this site:

Clear wording	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Confusing wording
Difficult to follow	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Easy to follow
Professional look	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Amateurish
Wordy	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Concise
Satisfying	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Unsatisfying
Confused	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Answered Questions

b) Opinion of the product

For each of the following, please check the box that best represents your opinion of the product:

Simple	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Complex
Unpredictable	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Stable
Unreliable	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Reliable
Valuable	◇-----◇-----◇-----◇-----◇-----◇-----◇-----◇	Worthless

Standard Usability Questionnaire

Instructions:

Based on your experience with similar products, please rate your agreement with the following statements about how you feel in general when using _____. Just circle or X out the level of agreement that applies (where 1 means strongly disagree, 4 means neither disagree nor agree, and 7 means strongly agree; and NA means it doesn't apply), as in this example:

1---2---3---4---5---6---7 NA ○

	Strongly Disagree	Strongly Agree
1. Both occasional and regular users would like it.	1---2---3---4---5---6---7	NA
2. I am satisfied with it.	1---2---3---4---5---6---7	NA
3. It is simple to use.	1---2---3---4---5---6---7	NA
4. It is wonderful.	1---2---3---4---5---6---7	NA
5. It is useful.	1---2---3---4---5---6---7	NA
6. I don't notice any inconsistencies as I use it.	1---2---3---4---5---6---7	NA
7. It is fun to use.	1---2---3---4---5---6---7	NA
8. It does everything I would expect it to do.	1---2---3---4---5---6---7	NA
9. It requires the fewest steps possible to accomplish what I want to do with it.	1---2---3---4---5---6---7	NA
10. It is user-friendly.	1---2---3---4---5---6---7	NA
11. It would give me more control over activities in my life.	1---2---3---4---5---6---7	NA
12. I feel I need to have it.	1---2---3---4---5---6---7	NA
13. I can use it successfully every time.	1---2---3---4---5---6---7	NA
14. It is flexible.	1---2---3---4---5---6---7	NA
15. I learned to use it quickly.	1---2---3---4---5---6---7	NA
16. It would make the things I want to accomplish easier to get done.	1---2---3---4---5---6---7	NA
17. I can recover from mistakes quickly and easily.	1---2---3---4---5---6---7	NA
18. It would help me be more effective.	1---2---3---4---5---6---7	NA
19. Using it is effortless.	1---2---3---4---5---6---7	NA
20. I can use it without written instructions.	1---2---3---4---5---6---7	NA
21. It meets my needs.	1---2---3---4---5---6---7	NA
22. It works the way I want it to work.	1---2---3---4---5---6---7	NA
23. It would save me time when I use it.	1---2---3---4---5---6---7	NA
24. I easily remember how to use it.	1---2---3---4---5---6---7	NA
25. I quickly could become skillful with it.	1---2---3---4---5---6---7	NA
26. It is pleasant to use.	1---2---3---4---5---6---7	NA
27. It is easy to use.	1---2---3---4---5---6---7	NA
28. I would recommend it to a friend.	1---2---3---4---5---6---7	NA
29. It would help me be more productive.	1---2---3---4---5---6---7	NA
30. It is easy to learn to use it.	1---2---3---4---5---6---7	NA