Usability Test Plan for "Getting Started with the Instacart App: A Step-by-Step Guide"

Prepared For: Professional and Technical Writing Course, Carnegie Mellon University

CC: Nupoor Ranade, Course Instructor

Completed By: Brandon Teola

Date: November 22, 2024

Purpose

The purpose of the ["Getting Started with the Instacart App: A Step-by-Step Guide"](#) usability test is to evaluate the document's assistance for users when performing necessary tasks on the Instacart app. This will help us understand what obstacles or confusion new users may face when engaging with our app. The results from this test can help us make improvements to the app so that the process for purchasing and managing items on the Instacart app is quick and easy.

This test plan includes:
- Problem Statement/Test Objectives
- User Profiles
- Methodology and Tasks/Scenarios
  - Number of Participants
  - Length of Sessions
- Test Procedure
  - Overview/Briefing
  - Scenario 1
  - Scenario 2
  - Closing

Problem Statement and Test Objectives

This usability test of the "Getting Started with the Instacart App: A Step-by-Step Guide" will provide qualitative information about our interest in understanding Instacart first-time users' experiences so that we can best support their use of the app. We will evaluate how well the guide facilitates their completion of the tasks. Tasks for testing the usability of "Getting Started with the Instacart App: A Step-by-Step Guide" include:

- *The visual organization of the document:* Is it easy to navigate, visually pleasing to the eye, and readable? Are the visuals helpful or excessive?
- *The procedure for downloading the Instacart app and creating your account:* Are the steps on the document easy and accessible for all users? Are there any unnecessary steps or information?
- *The procedure for adding items to your cart:* Are the steps on the document easy and accessible for all users? Are there any unnecessary steps or information?
- *Language:* Is the language understandable for all users? Is it accessible and easily translatable? Are there any style problems regarding concision?
- *Overall satisfaction:* How do users feel when completing the tasks? Is it easy and intuitive or difficult and confusing?

These questions and topics were created based on our understanding of potential usability issues or successes users may experience.

This usability test will result in qualitative information that is based on evaluating how well users navigate task completion with the document's guidance. Participants will be given a pre-test questionnaire to gain information about their experience and perceptions about online retail marketplaces, which will then be followed by two scenarios that ask them to complete specific tasks on the app. The scenarios will be followed by a post-test questionnaire which will provide us with feedback about their experience with the test and the tasks. Users will be scheduled in twenty-minute sessions including pre-test and post-test questionnaires. The test will be conducted in-person in private environments on Carnegie Mellon University's campus. The participants will use their mobile phone to complete the test and questionnaires.

User Profiles

Since this document is primarily tailored for new users, we will recruit 4 participants who have never used the Instacart app before. They may have experience with online retail marketplaces and other Instacart competitors, but our goal is having users who have no experience using the app. We will use the pre-test questionnaire to gauge more of an understanding about their experience and knowledge regarding the app and the tasks we are asking them to complete.

This is a general description of the user characteristics:

- Able to speak and read English
- Age must be between 18 - 55
- Must not have prior experience using the Instacart app
- Must have a mobile device (iOS or Android)
- Diverse identity backgrounds (goal for accessibility and understanding)

Methodology and Tasks/Scenarios

This section of the test plan describes the testing methodology and task-based scenarios we will use with our 4 participants in 20-minute increments.

Number of Participants

We plan to test a total of 4 participants: two from our Professional and Technical Writing course and two outside of the course.

Length of Sessions

The total length of the session will be 20 minutes including:

- Welcome and pre-test questionnaire: 5 minutes
- Task-based scenarios: 10 minutes
- Post-test questionnaire: 5 minutes

The estimated time for each scenario is noted below.

Test Procedure

The test will begin with an overview briefing/pre-test questionnaire, followed by the task-based scenarios described below, and a post-test questionnaire.

Participants will have their mobile phone (or computer if mobile phone is inaccessible) as the only resource they will be using during the test. This will not be stated in the overview briefing to avoid influencing the participants' actions in case they may feel the need to use outside resources to complete the tasks. The moderator will notify them that this is not allowed if they begin using outside resources, but the moderator will make note of this as an example of an obstacle.

Overview/Briefing (5 minutes)

The moderator will welcome the participant and explain the test. The moderator will emphasize that the user must think out loud while completing the task, and that they may remind them throughout the test if they are not. The moderator will also provide the participant with the pre-test questionnaire.

Scenario 1 (5 minutes)

You have been asked by a supervisor at your job to use the Instacart app to buy cookies and ice cream for a social event at your workplace. You have never used Instacart before, and after entering a prompt on a search engine, you have found the guide titled "Getting Started with the Instacart App: A Step-by-Step Guide". You will use this guide to begin fulfilling what has been asked of you by your supervisor. Follow the instructions in the document under "Creating your account" to download the app and sign up for Instacart.

Scenario 2 (5 minutes)

Now that you have created your account, you must add the cookies and ice cream to your cart. Follow the steps under "Generating a shopping list" to add the items to your cart. Stop once you have added them to your cart.

Closing

Moderator will ask the participant to complete the post-test questionnaire.

Moderator Script: "Getting Started with the Instacart App: A Step-by-Step Guide" Usability Test

Introduction

Hi, my name is Brandon Teola. Thank you so much for meeting with me today and being willing to participate in this study based on the Instacart app. Your participation will help me understand new users' experiences with the procedure document called "Getting Started with the Instacart App: A Step-by-Step Guide" so that I can improve the document to best assist new users.

Introduction to the Test

Today, you are going to be working with the Instacart app with the assistance of a procedure guide called "Getting Started with the Instacart App: A Step-by-Step Guide". This study will be focused on evaluating the usability of the guide document when new users work with Instacart. I will give you some tasks to complete with the app, and ask you some questions to get some feedback. Since your feedback is essential for this study, it is important that you think out loud throughout. As you complete tasks, please tell me what you are doing and why you are doing it. This may be awkward to do, but please try to do this as best as you can. I may remind you to think out loud while you are completing the task if I notice you may be working on a task without explaining it. For example, you can say things like "I am reading this …", or "I am seeing these options", or "I am clicking on this option". Also, I did not create the Instacart app, so feel free to say whatever you think about it.

While you complete the tasks, I am going to sit here and observe you, and I may ask you some questions as you complete tasks. Before we start, do you have any questions for me?

Pre-Test Questionnaire (Appendix)

To begin, I'd like you to fill out this brief pre-test questionnaire to help me understand your experience and knowledge about Instacart and other online retail marketplaces. While you are completing the questionnaire, please tell me what you are writing down and why you are writing these answers.

[Google Form](#)

[When the pre-test questionnaire is completed] Thank you. This will be great feedback!

During Testing

I have two task-scenarios for you to complete. Remember that this is not evaluating you as a user, but the usability and helpfulness of the guide document. Remember to think out loud as you complete each task and share any reactions or feedback you have as you speak.

Scenario 1 (5 minutes)
You have been asked by a supervisor at your job to use the Instacart app to buy cookies and ice cream for a social event at your workplace. You have never used Instacart before, and after entering a prompt on a search engine, you have found the guide titled "Getting Started with the Instacart App: A Step-by-Step Guide". You will use this guide to begin fulfilling what has been asked of you by your supervisor. Follow the instructions in the document under "Creating your account" to download the app and sign up for Instacart.

[After the first scenario] Thank you for completing that task and sharing your feedback. Let's move on to the next task after you fill out the first question on the Questionnaire for downloading the app and creating your account.

Scenario 2 (5 minutes)
Now that you have created your account, you must add the cookies and ice cream to your cart. Follow the steps under "Generating a shopping list" to add the items to your cart. Stop once you have added them to your cart.

Post-Test Questionnaire (Appendix)

[After the second scenario] Thank you for completing that task and sharing your feedback. That was the last task, so we can move on to the rest of the post-test questionnaire. Here is my post-test questionnaire. This is the last thing I will be asking you to do. Please remember to think out loud and share your responses and why you are writing those responses. This will help me understand your experience with the guide document and the Instacart app.

Google Form

After Testing

Thank you for participating in this study, your feedback will be really helpful for me when I revise the step-by-step guide.

Usability Test Report: "Getting Started with the Instacart App: A Step-by-Step Guide"

Summary

This usability test was conducted to evaluate the usability of <u>"Getting Started with the Instacart App: A Step-by-Step Guide"</u>, a procedure document I made to assist new users of the Instacart app with the basic tasks necessary for completing an order. As mentioned in the test plan, this usability test was conducted to assess the following objectives:
- The visual organization of the document
- The procedure for downloading the Instacart app and creating your account
- The procedure for adding items to your cart
- Understandable and accessible language
- Overall user satisfaction

I assessed the usability of the following tasks in the document:
1. Creating your account
    a. The steps for downloading the app
    b. The steps for signing up
2. Adding items to your cart
    a. The steps for choosing a store
    b. The steps for adding items to your cart

In addition to asking participants about these tasks and observing them based on given scenarios, I also asked them about the language and visual organization of the document, as well as the overall satisfaction.

For this study, I created a test plan (attached earlier in this document) based on common usability test practices. I developed a user profile, created two different scenarios for the participants to complete, and created a pre and post-test questionnaire for them. During the study, I observed participants as they completed tasks and took notes as they "thought out loud".

Findings and Recommendations

The study results included qualitative and quantitative information that address these goals, and provided significant findings that can be applied to revising the document.

Favorable Findings

Overall, one of the most important findings from this study was that all participants were satisfied with the visual organization and formatting of the document. For example, one participant responded that "the formatting and the images made it easy to know where I am in the process" when answering the post-test questionnaire section about what aspects of the document made completing the tasks easy. Another participant said that the "screenshots were helpful" when answering what aspects of the document made completing the tasks easy. This demonstrates that when considering usability, there is no need for the visual organization and formatting to be excessively revised because it is currently allowing new users to easily navigate the tasks.

Another favorable finding from this test was that the tasks were simple. In the pre-test questionnaire, three participants noted that having "short numbered steps" or "simple steps" were important features that they would be expecting in an effective procedure document. In the results, all participants described that the tasks were simple and divided in a manageable way. For example, one user stated that "The tasks only included one step, which made it simple to follow". This means that the overall structure of the topics, tasks, and steps were helpful for users, and do not need to be revised for usability.

Quantitatively, the results from the post-test questionnaire indicated that the two tasks users found most easy were "the steps for downloading the app" and "the steps for adding items to your cart". 4/4 participants rated both of these tasks as "very easy".

Problems and Recommendations

The test also provided a variety of usability problems in the document that can easily be revised. This table lists some of the usability problems (and describes them in more detail, if necessary) from high-order concerns to low-order concerns. These levels of severity can be helpful when prioritizing which usability solutions should be prioritized.

Usability Problem	Number Affected	Severity
Step Instruction: "Follow the verification instructions" step for "Signing up for Instacart" task was too vague and "requires some intuitive knowledge about how apps work"	2/4	High
Step Instruction: Users were met with pop-ups about enabling notifications, signing up for Instacart+, and allowing location tracking which are not accounted for in the document	4/4	Medium
Structure: One user thought the transition between	1/4	Low

"Signing up for Instacart" and "Choosing a store" was confusing		
Context: One user was having Wi-Fi troubles and had low storage, and thought it would be helpful if the document included a tip about what factors may result in the downloading process taking long	1/4	Low

Most of the usability problems are connected to the audience of this document. I tailored this document to college students who are often young adults (average 26.4 years old) and have experience with cell phones and cell phone applications. For example, I did not describe "verification instructions" because most of these would be intuitive for experienced cell phone users. I also did not describe possible pop-ups because experienced cell phone users are used to these and also find navigating them intuitive. Although, because most participants fell under the target age range and still recognized that these were not specific enough in the document necessitates adding additional information about these topics, or revising the document for a broader audience.

The low-priority usability problem about having context for downloading apps would be an appropriate revision if I added more details in the document or retailored it to a broader audience. The usability problem regarding the transition between "Signing up for Instacart" and "Choosing a store" occurred because one user expressed confusion about why "Choosing a store" was a separate task under "Generating a shopping list" and not part of the "Creating your account" section of the document. The user asked, 'Why is choosing a store not part of the sign up process?". I need to reconsider whether this task should be in the "Creating your account section" to best model the just-in-time information users need and recognize that the user interface of the app makes this task seem like a part of "Creating your account" as a new user. I will likely revise the document so that this task is a part of the "Creating your account" section.

Conclusion

This usability test for [Getting Started with the Instacart App: A Step-by-Step Guide"](#) fulfilled the intended purpose of gauging how new users experience the document when getting started with the app. The test showed that overall the document assists users and the structure and simple information satisfies new users. There were a few usability problems that could be revised, and these problems were connected to the fact that the document was tailored to a specific audience of young adults and college students who have experience with cell phone apps. As for next steps, I will consider revising the document by either adding additional context, or revising it to a broader audience to satisfy as many users as possible.

Appendix

Pre-Test Questionnaire

Thank you for participating on my usability test. Your participation will assist me in revising the guide document titled "Getting Started with the Instacart App: A Step-by-Step Guide". Before we get into the test, please fill out this short questionnaire so that I have some context about your experience with Instacart and other online retail marketplaces:

1. Name:
2. Have you heard of Instacart before?
   - ☐ Yes
   - ☐ No
   - ☐ Other:
3. Are you aware of any other online retail marketplaces/apps that have similar features (grocery delivery, retail store delivery, etc.)
   - ☐ Yes (name):
   - ☐ No:
   - ☐ Other:
4. What features do you look for in a guide/procedure document?
   a.
   b.
   c.
5. What features do you not appreciate in a guide/procedure document?
   a.
   b.
   c.

Post-Test Questionnaire

Scenario 1: Creating your account
Please rate the following:

	Very Easy	Easy	Somewhat Difficult	Difficult
The steps for downloading the app				
The steps for signing up				

Scenario 2: Adding items to your cart
Please rate the following:

	Very Easy	Easy	Somewhat Difficult	Difficult
The steps for choosing a store				
The steps for selecting items for your cart				

Which aspects of "Getting Started with the Instacart App: A Step-by-Step Guide" made completing the tasks easy?
 a.
 b.
 c.

Which aspects of "Getting Started with the Instacart App: A Step-by-Step Guide" made completing the tasks difficult?
 a.
 b.
 c.