

## Configurator Usability Study Plan

### Purpose of the study

The purpose of this study is to get feedback from SB owners on a new feature in OL v2 called the Configurator. The Configurator presents offerings, services or consumable items, to an OL subscriber for subscription or purchase.

In OL v1.5, customers subscribed to three different types of bundled subscriptions that came with certain offerings. In v2, subscribers will not get bundles. They will get only a basic subscription and will add the services and consumables ala carte using the Configurator.

Because there are many (appx. 20) different offerings, the offerings will be grouped into categories. One purpose of this study is to see if users can find the offering they are looking for and if it appears in the group they expected. A novel navigation technique has been designed for discovering what offerings are in each category. The design will be explored to see if users can use it and to see if they feel it is easy to use or confusing.

The Configurator will be used to add new services and to manage existing services. Users will need to be able to find the links to add new services. They will need to be able to find their way to the Configurator to un-subscribe to a service as well. Other management tasks would be to increase or decrease consumables such as web site storage or e-mail accounts.

### Research Questions

Given a task and a screen design, will users be able to find their way to the configurator:

- Coming from different entry points:
  - Coming from SB Home Nav (" + Add Stuff")
  - Coming from SB Home (Manage my Services)
  - Coming from SB Home (CXRM Messaging)
  - Coming from Application Consumable message (Storage bar)

Which method, A or B, gives the user the information they need to make a purchase decision?

Will users click on an item in the Configurator without seeing the price on the top level?

- Optimal price placement:
  - A - Putting prices in Marketing Gadget (1<sup>st</sup> Gadget in Configurator)
  - B - Putting prices in Action Gadget (2<sup>nd</sup> Gadget)
  - Putting prices in both (?)

Which method, A or B, makes it easier for users to find the service they looking for when they want to add it?

Which method, A or B, makes it easier for users to find the service they looking for when they are managing their services? Their consumables?

- Which are the better categorizing grouping conventions?

- A - Folders/Buckets (Grouped by task; “I want to Sell online” = Store Manager)
- B - View all & Filter by tags (by categories; Store Manager [tags: web, e-mail, commerce])
- Adding vs.
- Managing.

Do users understand what the status icons depict?

Which set of icons, A or B, better depict which services and consumables the user has, doesn't already have, or partially has?

Do users prefer to have the services and consumables listed without icons?

- Icon Indications of whether EU has a service/consumable:
  - A - Original set of icon indicators (Have it/Don't have it/Sorta have it)
  - B - Variation of original set (Have it/Don't have it/Sorta have it)
  - C- No indicators at all.

Do users understand the meaning of Submit-It and other terminology?

Do users understand how to change their eCommerce plan and the difference between the choices?

Do users understand how to change their consumable resources, e.g. storage space?

- Illustrate concept of changing plan:
  - Submit-It™ (one plan offering) vs.
  - eCommerce (two offerings)
  - Consumable (add or remove)

## Method

This is an exploratory study to get feedback on designs for the Configurator and associated tasks. This will follow a verbal protocol with frequent interaction with the Study Administrator. This method is being used because we are interested in the user's thought process behind choices and discoverability as opposed to an assessment study where we would be focusing on task completion success / failure and time on task.

Participants will be given written scenarios. The scenarios will describe a situation and give them a goal to accomplish, e.g., selling products online and from eBay. They will be given screen designs and will make choices and click on links to accomplish the goal. ~~If the choice they make is not the way to accomplish a task, they will see a screen that asks them to pause. The test administrator will ask them what they clicked on and what they expected to see. If they click on the correct link, they will progress to the next screen design to continue with the task.~~

The test administrator will control the flow and pacing by asking users to pause and reflect on what they see. For example, the first screen they will see is their Home. The test administrator will ask them to describe what they see; what would they do next to accomplish their goal. What would they click on? What would they expect to see? If they do not choose the correct link, they will be asked what else they see that would enable them to accomplish their task. If they do not

choose the correct link the second time, they will be prompted to click on the correct link and provide feedback as to whether they saw the link and describe what they think it means.

Upon arrival at the Configurator the first time, the administrator will ask the user to describe what they see and to explore it and describe how it works. During this exploration, we will see if the user comments specifically about pricing visibility. Open questions will be asked to elicit the users feelings about the amount of information shown, the UI technique for showing offerings. Probing questions will be asked as follow on to the open questions.

The research questions and feature coverage are mapped to the Scenarios later in this document.

## **Participants**

Eight SB owners have been recruited for this study. See the Screener questions document for criteria that was specified to the recruiters.

## Scenario 1

You are a general small business owner specializing in sales and distribution of party favors and novelties.

This screen is the internal (meaning, not shown to your customers) home website for your subscription. Whenever you log in with your credentials, this is the starting screen you will encounter. It is the hub for managing and accessing applications you've subscribed to as well as offering recommendations for applications you might be interested in.

You heard from a friend how successful their eBay-based business is. A couple weeks ago, while registering for Office Live for the first time, you suddenly recall that you had read some marketing blurb about certain Office Live offerings. One in specific seemed very relevant. Something about an offering that easily streamlines '**...selling products online and from eBay.**' And you're convinced! Today is the day you decide you want to sign up for this offering.

Before you click, I have some questions for you.

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### THIS SCENARIO COVERS:

- Coming from different entry points
  - Coming from SB Home Nav ("Add Services")
    - Coming from SB Home (Manage my Services)
    - Coming from SB Home (CXRM Messaging)
    - Coming from Application Consumable message (Storage bar)
- Illustrate concept of changing plan
  - Submit-It™ (one plan offering) vs.
  - eCommerce (two offerings)
    - Consumable (add or remove)

### Questions:

1. From here, tell me what you would do to accomplish this task. (1. SB Home)
2. If you clicked on that, what would you expect to happen?
3. Tell me why you would click on that?
4. [If wrong] Do you see something else? Had you noticed that before? Can you tell me why you chose the other link?
5. Go ahead and click now. (2. Marketing Gadget)
6. Tell me what you are looking at now. Is this what you expected? What would you do now? Explore this with your mouse. Tell me about this experience. Go ahead and click to proceed. (3. Action Gadget)
7. So you would enter your credit card number and what else? Tell me what you would do. (4. Credit card and 5. business info gadgets and 6. compete sign up gadget)
8. Go ahead and click. Tell me what you see. Is this what you expected to happen? (7.Commerce App)
9. Let's say that you Log out now to go to lunch. And then back from lunch, you login. Go ahead and click anywhere on the screen. (10. Home)

10. Tell me what you see. (changed Home with store manager added) [If they do not see a change, ask them, do you see anything different now. (10. Home with change)]
11. Let's say that three months have passed and you are looking at your Sales Report and see that there have been no sales. (11. Commerce App)
12. You no longer want to sell your product on line. You don't want to keep paying the monthly fee for Store Manager. What would you do? (13. Within app remove?)

1. From your OL Home, determine how you would proceed to accomplish this task.
2. Pay with your fake credit card number and complete your transaction.
3. After launching into the application, log out, and find your way back to the same offering splash page

## Scenario 2

You are a general small business owner specializing in sales and distribution of party favors and novelties.

This screen is the internal (meaning, not shown to your customers) home website for your subscription. Whenever you log in with your credentials, this is the starting screen you will encounter. It is the hub for managing and accessing applications you've subscribed to as well as offering recommendations for applications you might be interested in.

Your employee, who has been adding images and descriptions of your products to your customer-facing web site has told you that he was trying to add a image and he got a message that there was not enough space to add the image.

Before you click, I have some questions for you.

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### THIS SCENARIO COVERS:

- Coming from different entry points:
  - Coming from SB Home (" + Add Services")
  - Coming from SB Home (Manage my Services)
  - Coming from SB Home (CXRM Messaging)
  - Coming from Application Consumable message (Storage bar)
- Illustrate concept of changing plan:
  - Submit-It™ (one plan offering) vs.
  - eCommerce (two offerings)
  - Consumable (add or remove)

### Questions:

1. From here, tell me what you would do to remedy this situation. (1. SB Home)
2. What would you click on? What would you expect to happen? [website, indicator bar link, manage services-left nav]
3. [After opening the Configurator, note their reaction to Increase? Storage? Being selected in the Configurator Action area. ]
4. What would you do now? Do you have enough information to make the decision?

## Scenario 3

Once again you are at your Home. This screen is the internal (meaning, not shown to your customers) home website for your subscription. Whenever you log in, this is the starting screen you will encounter.

You have decided that you want to have an easy to remember/type domain for your customer facing website:

[www.partyfavors.com](http://www.partyfavors.com)

What would you do to make this happen?

Before you click, I have some questions for you.

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### THIS SCENARIO COVERS:

- Coming from different entry points:
  - Coming from SB Home (" + Add Services")
  - Coming from SB Home (Manage my Services)
  - Coming from SB Home (CRM Messaging)
  - Coming from Application Consumable message (Storage bar)
- Illustrate concept of changing plan:
  - Subscribing (one plan offering) vs.
  - eCommerce (two offerings)
  - Consumable (add or remove)
- Buying a domain through the Configurator
  - Vs. from within the Website

### Questions:

1. From here, tell me what you would do.. (1. SB Home)
- 2.