

INTRODUCING EVERNOTE REMINDERS

EVERNOTE REDESIGN PROPOSAL—DECEMBER 2011

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Introducing Evernote Reminders



Memory is fickle. As humans, we use contextual information in our environment to help us remember our priorities, what we should be doing and how we should do it. Nowhere is this more evident than the reminder.

We use reminders all the time: post it notes on a computer screen, alarm clocks, or our calendar reminding us where we should be. The challenge with remembering is not how we store information, but how we recall information. Evernote Reminders is one step towards solving this challenge.

Evernote Reminders is the result of a seven-week research activity that explored themes of note-taking, memory, Evernote functionality, and finally usability and product features. As a result of these activities, we have analyzed over fifty end-user findings to surface Reminders as the most important, end-user valued, and immediate opportunity for the Evernote team. Reminders' value proposition is highlighted in the box below.

This value proposition breaks down into three components:

- **Notes not UI.**

The newly redesigned Evernote packs in new functionality while providing more room for Evernote users to view their notes than ever before.

- **Set a reminder without missing a beat.**

People take notes just about anywhere, from bars to important meetings, Evernote is there. We designed Evernote Reminders to allow users to set a reminder on their terms without missing a punch line or getting lost in their phone.

- **Reminders on your device of choice.**

Evernote Reminders allows people to set their reminder 'device' of choice. Some people enjoy the 'symphony of alerts' of their PCs, phone, and calendar going off all at once. For others, one alert works just fine.

For new and existing Evernote users, Evernote Reminders is the simplest way to ensure you not only remember everything– but recall everything, on any device, at anytime.



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EVERNOTE BUSINESS OVERVIEW

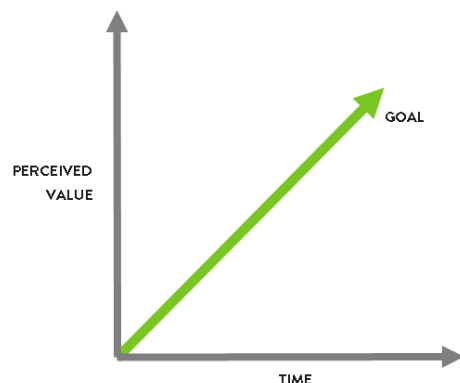
Evernote's mission is to give everyone a better memory. Currently it does this with a simple yet flexible application that allows users to capture notes, photos, and audio recordings. Evernote synchs this information to the cloud and allows users to access it from the web, desktop, or from many of the smartphone platforms it supports.

Currently Evernote is experiencing rapid growth, specifically in the International markets. Having launched in June 2008, Evernote surpassed the 10 million user milestone in April 2011 with the strongest growth occurring outside of the United States¹. As of September 2011, Evernote is growing at rate of 42,000 new users a day, up from 11,000 new users a day just a year ago².

	September 2011	September 2010	% Growth
Registered Users	12.5M	3.9M	220%
Active Users	4.5M	1.9M	136%
New Users / Day	42K	11K	282%
Paid Subscribers	568K	92K	517%

Business Model: Evernote has a “freemium” business model. Evernote’s applications and basic service are free. In effect, new users can use Evernote for free indefinitely. Active users can upgrade to the premium service, which offers extras like a greater upload capacity, at any time for \$5 a month or \$45 a year. Over 20% of users who have used Evernote for two years have converted to premium³. In 2010, Evernote unveiled ‘Evernote Trunk’ a developer ecosystem to allow 3rd party applications to integrate into Evernote.

Philosophy: Evernote’s aim is to make Evernote increasingly valuable to its users over time. The goal is to make Evernote an indispensable part of a user’s life over time.



1. “Evernote Tops Ten Million Users” Company Blog Post, June 6, 2011, <http://blog.evernote.com/2011/06/06/evernote-tops-ten-million-users/>

2. “Future of Evernote” Company Video, September 16, 2011, <http://www.youtube.com/watch?v=oSKvP2mqia4>

3. Unconventional Evernote Presentation, June 21, 2011, <http://www.slideshare.net/frontiersof/stavisky-fo-i-unconventional-evernote>

RESEARCH PLAN AND GOALS

We conducted our user research over a period of seven weeks in fall of 2011. Based on Evernote’s business objectives, we designed our research goal to identify opportunities to increase Evernote’s value and new user growth in the United States by designing valuable end-user functionality while improving usability. Because active Evernote users tend to become premium Evernote subscribers, identifying functionality that appeals primarily to premium users was a secondary objective.

RESEARCH OBJECTIVE: To identify opportunities to increase Evernote’s value and US new user growth by designing valuable functionality and improving usability.

We structured our research activities to explore four questions. We then identified research activities best suited to exploring each. We sequenced the activities as highlighted below:

QUESTION	ACTIVITY
What are users’ and non-users’ reactions to note-taking, memory, and Evernote?	Interviews
What are the associations people have with note-taking and Evernote?	Affinity Diagram
What are smartphone ¹ users’ reaction to our proposed concepts and functionality?	Concept Testing
What are smartphone ¹ users’ response to and interactions with our redesign prototypes?	Prototyping

We targeted three user profiles for the interview stage of our activities– ultimately converging on smartphone users for concept testing and prototyping.

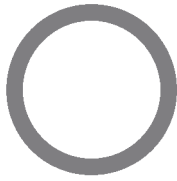
- **Evernote users:** current Evernote users
- **Non-Evernote Smartphone users:** use smartphone applications at least once a week, occasionally captures notes and information using a smartphone
- **Internet users that take paper notes:** Active internet users who primarily use paper (or a personal non-smartphone system) to take notes

We researched non-Evernote users to uncover any hidden deterrents or blockers to expanding Evernote’s user base. While Evernote has a number of potential uses and functionality, the research team decided “note-taking” was the best and most flexible definition of Evernote’s core use.

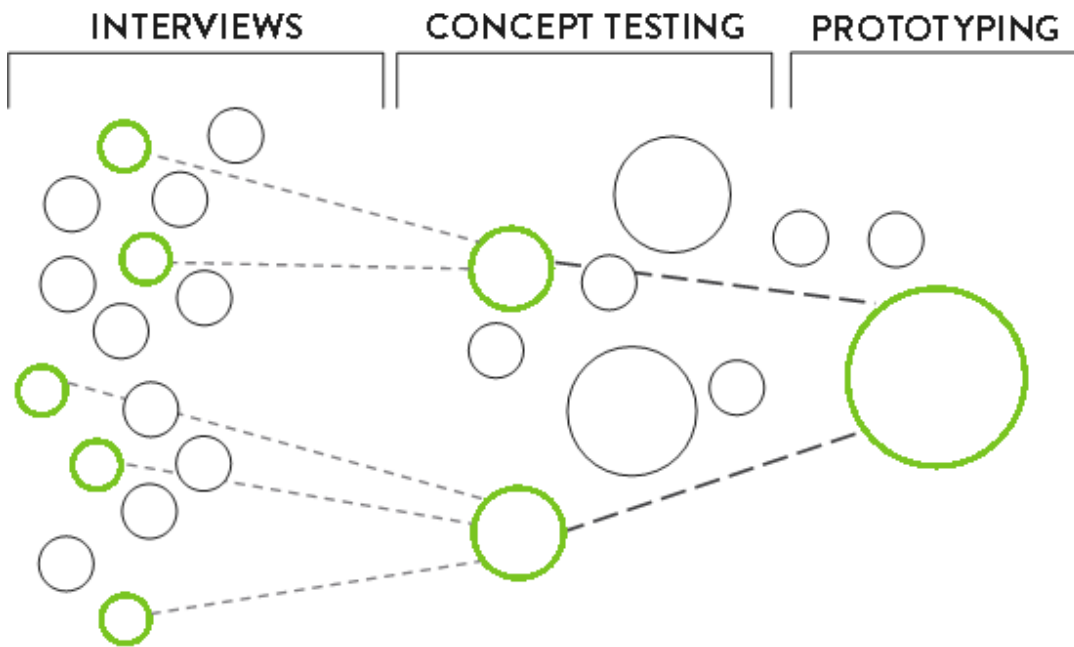
Limitation: Note this study prioritized smartphone users in the United States market.

1. Based on the interview and affinity diagramming findings we scoped our area of research to smartphone. This aligns with Evernote’s business, as most Evernote users begin on a mobile device. (See: “Evernote 2010: A Year in Stats” Company Blog Post, January 04, 2011, <http://blog.evernote.com/2011/01/04/evernote-2010-a-year-in-stats/>)

JOURNEY THROUGH RESEARCH



ur findings are based on insights that initially surfaced during interviews, were amplified during concept testing and resulted in positive user response during the prototyping phase. A full breakdown of our journey through research begins on page 16: Our Methodology.



Note in calendar with a reminder

Can access calendar from web connected device

Use my web calendar fairly often

Immediately enter into my calendar

Calendar for important dates and really important tasks in line

iCal

Calendar synced with mobile and computer

Calendar

Set up outlook calendar

It doesn't have a calendar [Evernote]

Use a large desk calendar

Formal note taking

Don't take notes while running around

Notes in college

Took notes while reading a chapter. Helps retain it better

On school, I would take notes in class

Keep track of things on the fly

Interacting with people [when]

At school

At Job site

Notes for classes

Drinks involved

How much does Evernote cost?

Wouldn't want to pay data charges to have a smartphone to use it [Evernote]

Evernote could get expensive

What's the premium version?

May need to increase storage

Tiered functionality [dislike]

I use the free [Evernote]

"All my notes still there on my iPhone"

iPhone notepad

I put everything in the phone book [notes]

Great to record info, helps me store everything but doesn't help me remember"

Web

Use Evernote on the web

Desktop

telling me about it, or I have to set reminders,

used iPad on conference call

Use app that came on iPhone

I take notes sometimes on a computer

Add list via smartphone format on PC

I'm a firm believer in if I have a note I always throw it in my calendar with a reminder usually a day or two or maybe a week before it physically has to be done.

Different Browsers

Multiple devices

Smart phone

iPad

Send myself an email

Email myself when really important

Things I want to remember, I email myself

Email from one account to another

Send e-mail about note to specially co-create

Duplicate, old and redundant information

Versioning is a pain

Hard to leave you routine

Evernote offers too many things I don't need

Trying to do too much

A bit clumsy [Evernote]

Can't "write" in Evernote

Evernote didn't

seem to capture audio clips

Pain

"Bad video...building a house was a bad metaphor"

little things that I know I won't remember, but note in school, reminder

Evernote seems time-consuming

I like the idea of pictures in Evernote

Evernote on web OS smart phone (app)

Cost of taking notes is low

"I wish Evernote had more templating"

UI is confusing sometimes

It's more than what I'm looking

AN EXCERPT OF INTERVIEW INSIGHTS.

[NOTES RELATED TO REMINDERS ARE HIGHLIGHTED IN GREEN]

e-mail

It's multi-platform

Use Evernote on Mac platform

Access from my phone instead of on paper

In other words the sticky note is a reminder to do something.

Android phones

Type via my finger

"Notepad, notepad on my phone..."

Evernote on girlfriend's iPod touch

SharePoint

Online Notes

I have to keep seeing over and over again, my wife has to keep

Laptop, phone, or work computer

If I need to remember it, I'll put it in my phone

Mac

Write down on iPad

The time that I remember that I need to do the thing, I obviously can't call my bike shop to make the appointment, so it's to transfer a reminder ...

Gmail

Send notes to others/self

E-mailing to myself

Paste portions of notes into email

Email myself

Our Solution

Throughout our research we noticed the gap between Evernote's promise to "remember everything" and the ability to "recall everything". We also noted how users often find it difficult forming and maintaining a new note-taking habit (such as using Evernote).

Evernote Reminders addresses both of these opportunities. Reminders help users not just remember but recall. Reminders are also habit forming. Once you set a reminder you are reminded of 'Evernote' once again, when the reminder goes off. This increases Evernote's use and context of use to include not only the point of information entry, but on recall. As with all new behaviors repetition and frequency are the key ingredients to developing habits.

Finally, based on our research findings, our team believes there are a lot of opportunities for innovation by expanding the Evernote value proposition from "remember everything" to "remember and recall everything".

Due to the time available for this research project, we limited our scope to redesigning the **Evernote iPhone application** (Evernote's most valued user base¹). We recommend implementing this design across smart phone platforms to ensure every platform UI is of equal caliber.

For new and existing Evernote users, Evernote Reminders is the simplest way to ensure you not only remember everything– but recall everything, on any device, at anytime.

'REMINDERS' HIGHLIGHTS from RESEARCH:

- The reminders concept scored 'very useful' more often than any other concept. The highest rating on our seven point Likert scale we used for concept testing.
- The reminders concept ranked first or second most important by 19 out of 34
- More than any other feature, respondents said they were 'very likely' or 'likely' to pay for the reminders feature. 'Very likely' and 'likely' were the top two ratings used on a seven point Likert scale.
- On average 'reminders' features were rated 'very useful' more than any other concept tested.

1. See: "Evernote 2010: A Year in Stats" <http://blog.evernote.com/2011/01/04/evernote-2010-a-year-in-stats/>

REDESIGN FEATURE SCORECARD

TOP 2 BOX*	FEATURE	PAGE
25	You can choose how a reminder will be delivered (text, email, computer pop-up, mobile pop-up)	13
23	You can receive reminders on a note on all your devices	13
23	You can “snooze” a reminder to remind you later	14
22	You can set a reminder related to your note	11, 12, 14
21	You can receive a reminder or alarm when you arrive at a set location. (i.e. grocery list reminder when you get to grocery store)	13
20	You can have a text message phone reminder sent to	13
20	You can set recurring reminders	13
20	On your PC you can choose to set an intrusive visual reminder for urgent priority notes	Not shown
19	You can set a reminder based on a date and location (i.e. a reminder when you leave the house on interview day to take copies of your resume)	13
19	You can have a note reminder sent to an email address	13
17**	On your smart phone Evernote has a simplified home screen so you can quickly create a new text note	11

On redesign screens, Top 2 Box scores appear as:



*Top 2 box scores are out of 34 respondents.

**When force ranked 11 of 34 respondents also rated this the most valuable concept (19 of 34 rated it first or second)

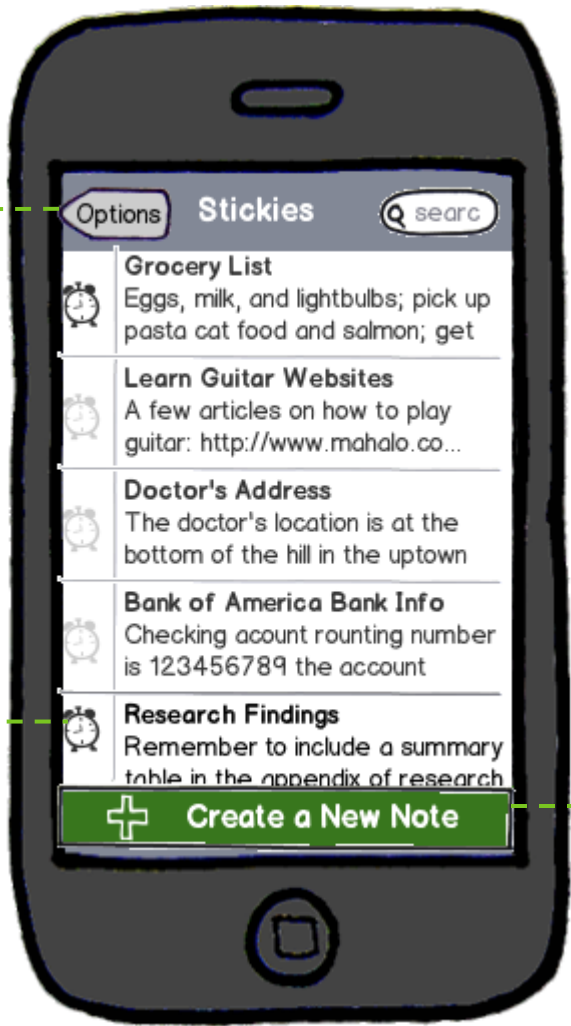
REDESIGNED HOME SCREEN

We simplified note creation from the home screen to one button based on usability best practices (Fitts’s Law), interview findings and concept testing results. Based on our findings the previous ‘home screen’ design did not optimize for the most common use: creating new notes.

Viewing the ‘Stickies’ notebook. Additional functionality such as tags and notebooks, is easily accessed by the ‘Options’ button.

At a glance, Evernote users can see which notes have a reminder. We provided one-click access to the reminder option.

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People take notes in contexts that don’t lend well to concentration. People capture information in bars, while driving, or walking. These are places where hitting the wrong button or searching for the right button is a big risk.

We enlarged this button to adhere to Fitts’s Law which states that the smaller an object is the harder it is to locate and the longer it takes users to click the object.

 19**

**When force ranked 11 of 34 respondents also rated this the most valuable concept (19 of 34 rated it first or second)

CREATING A NOTE

As cloud connection and increased storage become commonplace, the ideas of 'Saved' and 'Not Saved' states will become relics of the PC era. It is our expectation that users who are trained to expect applications to 'auto save' by games, Google Docs, Evernote's desktop applications, and other web sites and platforms will become frustrated when an application erases their data because the user did not hit a 'save' button.

We notify users with a soft animation that the note has been saved. We present a simple 'Done' icon on the home screen only.

During research activities researchers lost research notes after failing to hit one of the 'save' buttons on the Android and Windows Phone platform.



This icon for formatting adheres to more common user interface conventions for text formatting. The previous button a capital serif A, is not a common indicator for formatting text.



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While creating a note the 'reminder' functionality surfaces. This visual aid will help people think about whether they will need help recalling this note when it matters. Evernote users can also quickly see whether or not a reminder has been added.

This reminder will look like this when a reminder has been added:

Reminder: 4:00pm 11/3/11

SETTING A REMINDER

Our design goal for the reminder functionality was to keep the mobile use context in mind. Users have seconds, often in less than ideal settings to capture the information that matters most. Further we aimed to keep simple reminders fast and make complex reminders possible. During prototyping users felt it took little effort to set a reminder.

Like the 'create a note' screen we present a simple 'Done' for navigation purposes. This is followed by a soft animation to confirm that the reminder set successfully.

Users valued setting the reminder date and time together. They felt they could quickly set a reminder and getting back to their activities.

5 of 6*

If a user decides wants to cancel a reminder, they can quickly turn the reminder 'off'.

More advanced options such as adding a reminder based on location (when I leave the house) or location and time (when I leave the house on interview day) are available here.

21

25

Users can set up their devices on their web or desktop application. Here 'My Windows HP' is the name a user set for their home PC, using Evernote desktop.

The screen to set up a re-occurring reminder is also simple.

20

*Prototyping and Usability Testing five of six preferred setting both on the same screen.

VIEWING AN EXISTING NOTE

To support the reminder functionality we made a few modifications to the 'view note' screen.

One of the few times we use the function bar is on the 'view existing note' screen. The core functions include 'delete', 'share', 'edit' and a visual indicator as to whether the reminder is on or off.



Moved the 'search within a note' functionality to the more conventional upper right hand corner.

Most users do not 'title' notes. Because of this and to simplify text entry we decided to auto-format the first line of a note 'bold'. To standardize the untitled note behavior, the first line of the note becomes the 'title'.

One click access to the 'setting a reminder' screen.



UPHOLDING THE EVERNOTE PROMISE

Based on our research and examination of Evernote's business goals and mission we believe 'Reminders' is the next step in the Evernote mission: "To give everyone a better memory".

Psychological research defines the process of memory creation in three distinct phases¹:

- Encoding (getting information into our brain)
- Storing (retaining the information)
- Retrieving (getting the information back out– what most of us think of as re-calling)

In our research, retrieval functionality surfaced as a particular concern. As one participant stated, "[Evernote is] great to record information and it helps me store everything, but it doesn't help me remember. The recovery and accessing [of] data is another [important component] to remembering".

People rely on environmental triggers (retrieval cues) to aid in the memory recall.

Without these triggers, memories are often inaccessible and ultimately forgotten. Therefore, the 'Reminders' functionality acts as a retrieval cue, and is a vital step on the path to toward enhancing Evernote's mission to provide users with a better memory.

In addition to aligning with the Evernote promise, we believe the reminders feature also adheres to the business goal of increasing value over time. Evernote has an opportunity to move beyond capturing valuable information, to also ensuring the information is retrieved when people will need it most.

Finally, Evernote's potential audience is increased when the promise expands from 'remember everything' to 'remember and recall everything'. We are inspired by the next wave of breakthrough designs and features this approach inspires.

For new and existing Evernote users, Evernote Reminders is the simplest way to ensure you not only remember everything– but recall everything, on any device, at anytime.

1. Meyers, D. (2011), *Psychology in Everyday Life*.

Our Methodology

We set out to gain a broad understanding of participants' general note-taking behaviors, experiences, and expectations, as well as their reactions to Evernote. We then analyzed and further distilled the data to create categories out of participants' associations with note-taking and Evernote. Next, our team interpreted these categorized associations in the form of proposed Evernote functionality redesigns. We conducted a survey to gather participant feedback on the proposed functionalities. We used the survey results to redesign Evernote as a low-fidelity prototype. Finally, we gathered participant feedback on our low-fidelity prototype, allowing for further refinement of our final redesign recommendation.

The following sections include more information on the research activities we conducted, and the insights we surfaced on our path toward our proposed solution.

INTERVIEW ACTIVITY

INTERVIEWEE PROFILES

OVERVIEW

Premium Evernote User	1
Evernote Users	3
Smartphone User	6
Paper Note taker	6

What are users' and non-users' reactions to note-taking, memory, and Evernote?

Our research team conducted 16 interviews to gain in-depth qualitative data about participants' note-taking behaviors, experiences, and expectations. Additionally, we explored participants' general reactions to various aspects of Evernote. Interview data emerged as key quotes, words, and themes, which we analyzed as part of the affinity diagramming activity.

The following describes the process and high-level findings of our interview activity.

METHODOLOGY

Our participants represented three User Profiles which based on an analysis of syndicated research and Evernote company documents: Evernote User, Smartphone User, and Internet Non-Evernote Users. We recruited 16 participants that matched our three user profiles, including one premium Evernote user recruited using Facebook ads. To each non-Evernote user we interviewed, we showed the Evernote promotional video to gain their reaction to the concept. We transcribed the responses of each interview.

RESULTS

After we conducted and transcribed the interviews, we analyzed the data by reviewing the transcripts and highlighting significant quotes, words, and reactions. The interviews provided us with an abundance of qualitative data, which we grouped into affinity clusters, allowing us to compare, quickly synthesize, and prioritize key findings. Our affinity diagramming analysis is described in the next section.

Key Quotes	Clusters from Affinity Diagram
"I needed to tame the paper monster in my life"	Organization
"I lose the notes I take."	Organization
"Evernote offers too many things I don't need."	Evernote feedback
"It's more than what I'm looking for."	Evernote feedback
"I need a reminder to be sure I remember everything."	Reminders
"I have to keep seeing it over and over again."	Reminders
"High priority notes go on top."	Prioritization
"I would like to store notes by priority."	Prioritization

AFFINITY DIAGRAMMING

OVERVIEW

What are the associations people have with note-taking and Evernote?

Following our interviews, we wanted a quick and efficient way to organize the interview data. Affinity diagramming (also referred to as clustering) offered a quick and powerful way for us to analyze large volumes of qualitative data.

METHODOLOGY

We printed hard copies of each interview transcript and to further familiarize ourselves with the interview data. Each team member highlighted a different team member's interview transcript for key findings. After combing through over sixty pages of interview notes, we wrote all key highlighted quotes and insights onto post it notes. We next moved and arranged the post-it notes based on their perceived affinity to the post-its surrounding it. At the completion of the activity we named post-it clusters.

RESULTS

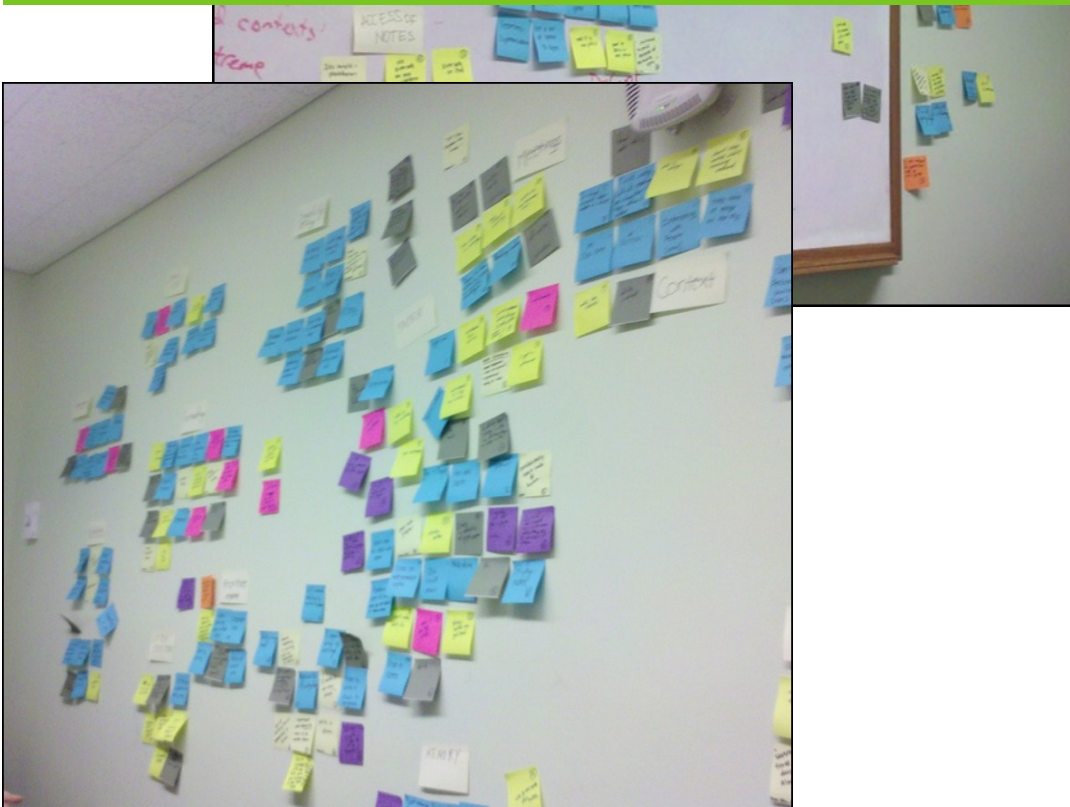
Clear groupings emerged that brought to light themes associated with note taking and Evernote. Along with the group names we quickly developed the following high-level themes. A raw output of the themes that emerged are highlighted below.

- | | |
|---|--|
| <ul style="list-style-type: none">• Paper is important• Writing has its benefits (and fans)• Paper has its drawbacks• Evernote seems confusing• Note taking is heterogeneous (everyone has their own method)• People stick with basic product functions and do not explore to discover more• Layout is important• Lists are the most used structure• Many notes are never relived• People value a simple setup and quick learning curve• Having notes in one place is preferable• Build for a mobile life• Learn from but do not cater to 'extreme | <ul style="list-style-type: none">users'• People don't optimize their note taking 'system'• Bridge the gap between old and new habits• Remembering everything can't stop at recall• Some notes need total recall, others exist only for the purpose of creating them• Good note taking habits need continuous reinforcement• Importance of organization• Notes are ever day life—some people embrace it, some embrace the chaos• Seeing is remembering |
|---|--|

Themes highlighted in bold became concepts in the next research activity, concept value testing.



EMERGING INSIGHTS



CONCEPT VALUE TESTING

OVERVIEW

What are smartphone users’ reaction to our proposed concepts and functionality?
After our interview activity and the affinity diagramming process, we constructed a concept-value survey. Concept-value testing is a flexible way to get users’ initial reactions and responses to new product concepts or new product usage scenarios. Based on interview feedback highlighting note-taking as an ‘on-the-go’ activity, we narrowed our scope to focus to smartphone users.

METHODOLOGY

Beginning with the affinity diagramming themes, we quickly prioritized the themes to determine the scope of subsequent research activities. For example, while paper emerged as a very important part of note-taking, we excluded paper from our scope due to time constraints and technical complexity. For each theme, we brainstormed an exhaustive list of features and improvements. We then voted on which themes had the most business promise based on the interview data and the strength of our research findings. Out of the themes, four concepts emerged: Organization, Reminders, Prioritization, and a Simplified Home Screen.

We created an internet survey which gauged the perceived utility of the concepts overall and the perceived usefulness of individual features within each concept. We also asked each respondent to rank the concepts against other concepts (forced ranking) and explored likelihood of users to pay for each concept.

RESULTS

We received 34 complete survey responses. Of the respondents 29 were smartphone users. We used Top 2 Box scoring to prioritize results of the seven point Likert scale rating. Our Likert scale ranged from ‘very useless’ to ‘very useful’. Top 2 Box results include users who rate a functionality most highly (in our case a ‘useful’ or ‘very useful’ rating). We aimed to identify functionality users that generated the most passion and resonated broadest with users.

The table on the following page highlights the overall findings. After a review of the overall concept ratings and individual feature ratings, the reminders concept emerged as the area of highest utility to the respondents. In overall rating, ordinal ranking, and likelihood to pay, Reminders and Prioritization rated closely in the final tally. However, when we analyzed the ratings of the features within each concept, Reminders clearly scored higher. Existing Evernote users ranked reminders as the most important concept. We incorporated the highest-rated feature from the simplified home screen concept into the final prototype.

SURVEY RESPONDENTS*

Evernote Users	11
Non-Evernote Users	25

DEVICE OWNERSHIP

Tablet users	11
Smartphone Users	29
PC Users	35

**34 completed surveys., due to a challenge with the software we were unable to filter incomplete surveys.*

CONCEPT VALUE TESTING (CONTINUED)

TOP FIVE FEATURES (by Top 2 Box score)

Top 2	CONCEPT	FEATURE
25	Reminders	You can choose how a reminder will be delivered (text, email, computer, mobile alert)
24	Reminders	You can set which devices to receive note reminders on
24	Organization	You can group related notes
23	Reminders	You can receive reminders on a note on all your devices
23	Prioritization	You can view your notes in order of priority

OVERALL CONCEPT RATINGS

	Overall Concept Rating		Forced Concept Ranking	
	Top Box	Top 2 Box	Ranked 1st ¹	Ranked 1st or 2nd
Organization	6	19	5	12
Reminders	7	16	10	19
Prioritization	6	19	12	22
Home Screen	5	13	11	19
	Likelihood to Pay		Average Feature Rating	
	Top Box	Top 2 Box	Top Box	Top 2 Box
Organization	0	5	9.4	19.5
Reminders	2	5	10.5	20.5
Prioritization	2	2	8.3	19.4
Home Screen	0	5	6.0	17.2

1. A Qualtrics survey software glitch allowed some users to force rank multiple number one rankings.

PROTOTYPING & USABILITY TESTING

OVERVIEW

What are smartphone users’ response to and interactions with our redesign prototypes? Following the concept-value survey, our team moved into the prototyping phase. Having identified reminders as our primary redesign opportunity during concept-value testing, the team came up with a number of prototype alternatives. The goal of the prototype usability testing activity was to gather user feedback on a number of design alternatives, identify usability issues, and gather user impressions of the prototypes. Based on the on-the-go nature of note-taking as identified in the interview activity, we decided to prototype the smartphone experience. Because Evernote’s most valuable users are iPhone users, we began with the iPhone as our design center¹.

METHODOLOGY

We conducted prototype testing activities with 6 smartphone users. We constructed a paper prototype with a cardboard backing to provide the sturdy feeling of a phone in a user’s hands. During usability testing, one research team member served as a facilitator and a note-taker, while another team member served as the ‘smartphone’ and operated the paper prototype. We asked users to speak aloud about their thoughts and actions while touching the ‘screen’ to interact with the prototype. After the prototype usability session, we asked users follow up questions. In between user sessions, we discussed the usability issues discovered and modified the prototype to fix important issues. Subsequent users then provided feedback on the most up to date prototype.

RESULTS

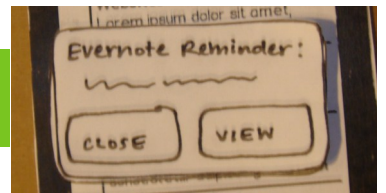
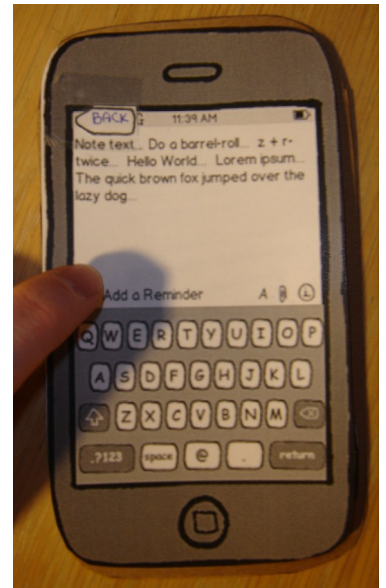
Most research participants stated that they found the prototype to be intuitive. However, we identified several opportunities to improve the prototype. Additionally, most participants mentioned uncertainty about whether their reminder saved when leaving the edit reminder screen. We addressed this issue by creating an animation that indicates the note saved successfully. Users were unsure, based on our original designs, where to go for additional ‘note views’ such as views by tags and by notebook. We changed the icon and label on the home screen to address this issue. With a few minor modifications (‘text message’ replaced ‘SMS’) and consistency fixes (consistent use of ‘done’ chevron), we developed our final mockup illustrated in the ‘Our Solution’ section.

Overall, the prototype was very well received by prototype testing participants and viewed as an easy way to add reminders to notes.

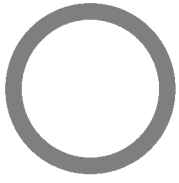
PROTOTYPING PARTICIPANTS	
Former Evernote Users	2
Non-Evernote Users	4
DEVICE OWNERSHIP	
Tablet users	1
Smartphone Users	6
PC Users	6

1. See: “Evernote 2010: A Year in Stats” <http://blog.evernote.com/2011/01/04/evernote-2010-a-year-in-stats/>

PROTOTYPING “HANDS ON”



Additional Opportunities



ver the course of any user-centered design activity, teams identify more paths than time or resources allow to fully research. As a part of our research, we surfaced insights that have merit but for various reasons were not pursued as our core redesign solution. We are providing three additional opportunities that we identified during our research. These opportunities can be further explored or used for supplementing other research activities.

These additional opportunities are:

- Paper
- Prioritization
- Evernote Opportunities

PAPER

OVERVIEW

While society plots its course to a digital destiny, paper remains the elephant in the middle of the room. Paper surrounds us in notebooks and post-it notes. As a part of our research activities, we sought to learn why paper has persisted as a mainstay in our information storage habits. Our goal was to identify features that draw inspiration from the benefits of paper note-taking. What we found is that almost everyone uses paper in some capacity as a part of their designed or ad hoc note-taking “system”. However, there is a disconnection between the use of paper and the growing use of technology for note-taking. Current note-taking technology does little to help paper note-takers easily utilize digital and analogue tools side by side.

WHERE IT SURFACED

Our interviewees turned out to be avid paper note-takers, and we asked them a variety of open-ended questions about their current note-taking habits. When we studied our interview results through affinity diagramming, the pervasiveness of paper was clear. Paper subsequently emerged in a few of our key themes (p. 18).

Through this exercise, we learned that paper is still important, and that people find that just the act of writing things down helps them to remember better. People prefer to store notes all in one place, for example in a trusted Moleskine, but they also like the flexibility paper offers for jotting down both long form and short form notes in cramped and on-the-go settings. Paper does have its drawbacks. A lack of search and the easily lost nature come to mind. However, there is currently a lack of tools that allow people to bridge old and new habits.

IMPLICATIONS

Avid users of paper notebooks may never go digital (or primarily digital). However, by analyzing the key themes, some of the more bimodal note-takers could convert to primarily digital. Solutions could be developed, specifically on tablet form factors, to encourage the act of writing on a digital surface. Additionally, existing notebook form factors do not allow for easy scanning. Perhaps a custom brand of notebooks complete with companion scanner could make archiving paper notes as simple as inserting a smart card into a camcorder.

Optimization of paper note-taking could allow for better storage, organization, and retrieval (through search) of notes while reducing the clutter of old notes. The hope would be that as users become more comfortable with Evernote, they could begin to transition to more advanced digital features.

PRIORITIZATION

OVERVIEW

Prioritization emerged as one way that research participants imposed order on their disparate note-taking. Consider how interviewees described what happens to their notes: “Sits in a drawer” stated one when asked where his notes go, “Put the note in a very visible and annoying place like center of laptop screen or car dashboard” stated another. The differentiating quality between the notes that go into drawers to be forgotten or referenced at a later time and ones that go into “visible and annoying” places is their priority. During our concept-value testing activity, Prioritization tied Reminders when rated for its usefulness as a concept.

WHERE IT SURFACED

Prioritization first surfaced during our initial interview activity. Research participants mentioned that they had a “hodgepodge of a thousand different things” and struggled with “clutter” in their note-taking. Prioritization emerged as one way that participants organized their notes. We followed up on our interview insights by testing prioritization and prioritization features during our concept-value testing activity. Prioritization rated highest among the four concepts tested, and we felt overall it was a close second to ‘reminders’.

Prioritization features that rated highest for usefulness in the Top 2 Box rating included:

- You can view your notes in order of priority
- You can archive notes so they no longer appear within your notes view, but you can still retrieve them by searching
- You can set a recurring priority for a note (for example set note titled “status report due” to become high priority weekly)
- You can set priority levels for notes (for example: high, medium, low)

IMPLICATIONS

Recall continues to be a challenge for note-takers, and prioritization is one way that note-takers highlight their most important notes. Viewing notes in order of priority was rated as “useful” or “very useful” by half of our concept-value survey respondents, and we recommend that Evernote further explore this feature through prototype testing. Increasing Evernote value over time is an important dynamic in Evernote premium conversion rates, and prioritization can contribute to the perceived value of Evernote.

EVERNOTE OPPORTUNITIES

OVERVIEW

In our research, users surfaced a number of prompted and unprompted frustrations with Evernote. We feel that Evernote can address many of the frustrations with a few elegant design solutions. A breakdown of three key user frustrations follows.

SYNCHRONIZATION

Users mentioned issues with data synchronization in several contexts. Many users complained that they were unable to tell which notes synchronized to the cloud after creating or editing notes. For example, a user might create a note on their desktop, close their laptop and rush out only to discover in an inconvenient moment that the note had not synced. This reduced users' confidence in the accuracy and reliability of Evernote. We suggest a synchronization status indicator, for example graying out notes that have not been synced.

The lack (or inconsistent implementation) of auto-synchronization functionality was also mentioned. Some users reported losing data because they failed to press the save button when moving from Evernote to another app and back on a smartphone. We suggest a system similar to that used by Google Documents where data is automatically synced to the cloud frequently, and a 'Done' button to replace save and cancel buttons. A full breakdown of our assessment of the save vs. done buttons is on page 12.

PREMIUM

Few Evernote users were aware that Evernote had a paid offering, and the premium user we interviewed, while satisfied with Evernote, could only vaguely speak to the benefits of being a premium user. We view this as a challenge for two reasons. The first reason is that there appears to be a dichotomy between Evernote's promise of simplicity and the increasingly complex (trunk, web clipping, formatting, encrypting, and tagging features) design for power users. The second is that Evernote has not clearly articulated the value of premium Evernote. As most notes are small unstructured files, Evernote does not lend well to storage limits that most freemium business models use to differentiate offerings. Perhaps premium users should get access to a 'pro user' client as well as a premium service.

TRUNK

On the Windows Evernote platform, Trunk takes up the most valuable screen real estate (a red button with a plus sign near the center of the tool bar—right beside the new note dropdown) yet many users expressed a dislike for or a lack of understanding of the "Trunk" function.

APPENDIX

About Our Team



we are an interdisciplinary research team comprised of individuals with experience across disciplines ranging psychology to engineering. As of Fall 2011 we are all enrolled in University of Washington's Human Computer Design Engineering program.

Mark Tull is a communications consultant and biotech operative specializing in medical devices. He has experience in global clinical trials and regulatory affairs as well as with political lobbying and government transportation programming. He also bikes. A lot.

Karla Holman has been working in IT at the Boeing Company for just over a year as a Systems and Data Analyst. She graduated with a degree in Computer Science from the University of California at San Diego in 2010.

Kali Kuwada is an educational psychologist specializing in instructional design for underrepresented student populations.

Mikal Lewis is an MBA by education and Product Manager by trade. He has collaborated on some of consumer tech's most innovative experiences as a Product Planner on Windows 7 and Windows 8. Prior to rejoining Microsoft, Mikal led Qworky, a meeting software startup, recently profiled in Inc Magazine.

Anastasiya Smirnova is a software engineer with experience in all parts of the software development cycle. Her expertise includes analysis and design of system integrations. In her current role, she drives the delivery of android applications at T-Mobile USA.

CONCEPTS FROM CONCEPT TESTING

ORGANIZATION

Evernote just unveiled a new feature that allows you to organize your notes more effortlessly than ever before. Evernote's new organization feature is flexible enough to keep you organized on your terms and even allows you to format notes into bullet points or checklists to keep notes organized.

REMINDERS

Evernote recently added the ability to set alarms to remind you when an important note must be reviewed. You know that in order to remember you have to look at the note, and this new feature from Evernote will make it easier than ever to do so.

HOME SCREEN

The new Evernote interface is simplified to only present you with features you care about when you care about them, because you should not have to spend time figuring out a confusing interface.

PRIORITIZATION

Evernote's new prioritization feature allows you to prioritize your notes and gives you clear and quick access to your most important notes first

USER PROFILES¹

USER PROFILE 1: EVERNOTE USER

At least 18 years of age

A current Evernote user (use once a week)

Free or premium subscriber

USER PROFILE 2: SMARTPHONE, NON-EVERNOTE USER

Age 18-55

Uses smartphone applications at least once a week

One of the following: student, bookmarks webpages regularly, or creates personal lists at least once a week

USER PROFILE 3: PAPER NOTETAKER

Age 18-55

Owns a PC or Tablet; uses at least two PC devices each week

Does not have a note taking system or prefers paper to capture most information

1. User Profile 3 was recruited only for the first phase of research.

CURRENT IPHONE DESIGN (FALL 2011)

