Prototype Test Results:

## Background and goals

This usability study gathered assessment data about the effectiveness of [Website] navigation for users performing basic, common tasks. Randomly selected participants were asked to perform 11 tasks on a simple, partially complete prototype. Managers and individual contributors were given slightly different task lists.

Data collected on each task include:

* Successful completion
* Whether hints were required
* Did users make positive or negative comments
* Were the first click (bucket) and second click (group) correct
* Did users ever feel lost (come to a full stop and say something like “I don’t know” or “I give up”)

Modifications were made to the prototype during the testing phase, in response to user feedback and behavior.

## Research questions

### How easily and successfully are users able to find the content they need on the site?

* Overall users were highly successful, with most tasks having a 100% successful completion rate.
* The easiest tasks were:
  + **#4** (what skills are needed to advance to the next level in your position)
  + **#5b** (find the dental claim form)
  + **#6** (find current job postings)
  + **#7** (find new employee checklist – both manager and non-manager version)
  + **#8b** (find the benefits enrollment change form)
  + These tasks had 100% successful completion, 0 or 1 users needed a hint, 100% first click correct, and no users feeling lost.
* The most difficult tasks were:
  + **#3** (find scholarship information). Users were confused by the label *Family Health and Wellness*. Many users commented that because education is not related to health and wellness, they did not even look at this group on the menu. During this task nearly half of all users came to a full stop and said “I don’t know” or “I give up.”
  + **#6b** (find the rules about transferring to a different location). Initially this information was buried in the list of all policies under *Our Company*, and users had no idea how to find it or even what to look for. We added a *Job-related Policies* page to the *Career > Jobs* group, which improved completion of this task considerably.
* Additional common problems:
  + Users were confused by *Time Away & Leave* being in *Career* rather than *Life*. In the card sort there an even split between these two categories. However, in the prototype test we found that users who thought it belonged in *Career* would also look in *Life*, but users who thought it belonged in *Life* were less likely to look in *Career*. We moved this group into *Life*, which improved first click/second click rates, and reduced hints.
  + Many users expected *Holiday Schedule* to be in *Life* rather than *Our Company*. This was a surprising result, as the card sorters placed it in *Our Company* by a comfortable margin. The problem was compounded because users expected *Holiday Schedule* to be in the *Time Away & Leave* group, which was also not where they expected. We added a cross-link in *Time Away & Leave* which improved first click/second click rates.
  + Managers were confused by performance information: both its location (managers’ resources not separated out) and the page titles. We created a Performance Resources for Managers page which improved first click/second click rates, and reduced hints.
  + Managers did not know about the manager version of the new hire checklist. In task 7 (help a new hire get started), all but one manager ignored the *Managers* group on the menu and went straight to the employee’s version of the checklist. This was counted as successful completion.

### What paths do users take to completing a task?

* Users found many different paths to complete the tasks, and looked for paths (search, A-Z links) that they are familiar with on [previous intranet] but were not available in the prototype.
* Users liked it when a link was provided in multiple places (for example, vacation policy under both *Policies* and *Time Away & Leave*).
* Users liked the left column navigation. Many used the mega menu to get to the correct section or group, then relied on the left nav to find content within that section, even if the content was also available as a direct link on the mega menu.
* Users did not like it when the only path to content was embedded in text.

### How well does the site support the paths and goals of users? How closely does the organization and flow of the site match users’ expectations? Do they find it intuitive or confusing?

* The task-based structure of [Website] is a major change. Many users expected it to be organized like the departmentally-based SWW. Users frequently clicked on *Divisions/Departments > HR* expecting it to contain all human resources content, like [Old Website].
* That said, many users made comments like “once you get used to it, it makes more sense” and “it made sense once I learned what these things [the bucket labels] mean.” This suggests that education will get users through the initial shift in mental model.
* Many users praised the [Website] structure with comments like “intuitive,” “easy to navigate,” “easier to find information.”
* One user praised instances where [Website] was organized around her needs, not HR’s internal structure (and complained vocally about the reverse).

### What obstacles do users encounter on the way to completing a task?

* As described above, poor labeling or groups located in an unexpected bucket were sometimes obstacles.
* Links buried in paragraphs of text (or even wordy bullets) was a common problem. Many users complained about this as a common characteristic of [Old Website] content. (Users who got lost for this reason were not recorded as “lost” in the raw data, as this is a content rather than navigation problem.)
* Participants encountered usability issues with the left navigation: the current page being clickable on the menu, some menus being too long, and arrows that suggested a link was expandable like an accordion.

### Do users understand that group titles on the mega menu (i.e. *Policies*) are also links?

* Generally, no. While some users did click on group titles, this was not reliable.
* Findability is improved by having at least one sub-link under each group title. Links that stood alone on the mega menu were invisible to many users.
* Some users were more likely to click a related page in the same group and then find the main page in the side nav, rather than clicking the main page in the mega menu. Again, multiple paths improve the user experience.

### How do users feel about the number of steps it takes them to complete a task?

* Users mostly made positive comments about the number of steps. Many users praised the groups on the mega menus, saying that reduced the number of clicks to get to key information. Several users commented that they found information much more quickly on [Website] than on [Old Website].

### Look and Feel

* Although we were testing navigation, participants uniformly praised the design/layout of [Website]. “Feels less busy” and “clean looking” were typical comments.
* Many users liked the large font size and commented that it was easier to read.
* However, users also frequently complained that links had too little color contrast and were difficult to find.

## Recommendations

* **Labeling**. Many labeling problems were found and corrected during the testing phase. There are a few outstanding issues:
  + *Family Health and Wellness*. Participants found this label misleading. One user suggested *Family Benefits* as an alternative, although that might also be confusing since “benefits” has a specific meaning in human resources.
  + *Performance content*. Many areas of [Old Website] need content reworking and more meaningful page titles; this one was apparent during the tests.
  + *Employee*-*paid Optional Benefits*. This label has a specific meaning in HR, but seems meaningless to regular employees. Many users clicked this link when they were confused, making comments that suggested they had no idea what it was & thought maybe it would be something useful.
* **Multiple paths**. Users will attempt their preferred method of navigation first, so providing multiple paths improves the user experience.
  + For important links such as the list of policies, add a sublink to the mega menu with the same target URL as the group title (i.e. “All Policies”).
  + Meaningful cross-links on the mega menu greatly improve findability (for example linking to the holiday schedule in both *Our Company* and *Life > Time Away & Leave*). However, do not add so many cross-links that the menu becomes cluttered.
  + Cross-links in the left nav also improve findability, and there is more leeway in the left column to add links without causing clutter.
* **Left nav**.
  + The current page should not be clickable in the left nav.
  + Either make groups in the left nav expandable and collapsible, or find some way to make the menu much smaller (for example only showing a subgroup like *Dental*, not all of *Benefits*).
  + Use the arrow icon to indicate when a group is expandable. If we do not end up having expandable menus in the left nav, replace the arrow with another icon that does not suggest expandability.
* **In-text links**.
  + Users have great difficulty finding in-text links; use them as little as possible.
  + When in-text links are necessary, use meaningful anchor text, bullets and/or bold to make them easier to find.
* **Look and feel**.
  + Increase color contrast for links, and consider adding other visual cues (such as hover styling).
  + Try to maintain the clean look of the prototype when incorporating the mass of functionality the final site will include.
* **Education.**
  + [Website]’s task-based structure is a major change from [Old Website]’s departmentally-based structure. No matter how well organized [Website] is, its launch must include education to help users adjust to the new mental model. News stories will be helpful, and I suggest that we go beyond that and research other ways to teach users (videos? popup tutorial? kiosk in cafeteria?)
  + Many managers ignored the *Managers* group on the mega menu. They seemed to not be expecting content for managers collected in one place, or even on the website at all. Rather they expected to get their content in other ways. For instance one manager said that when she has a new hire, HR always emails her the checklist. She did not know she could also find it on [Old Website]. I suspect managers will find this content more quickly if there is outreach to tell them it’s there.

## Follow-up research

I suggest we do a round of validation testing closer to launch, to evaluate ease of navigation when [Website] is more fully built out.

Depending on our production schedule and available time, we could also user test key features as they are incorporated (for instance, when A-Z links are available how does that affect the way users navigate). We might want to explore simplified testing that takes less time (for example quickly test a few people in a conference room instead of a full round of testing in [Location]).

## Raw data

[URL of raw data files]

## Tasks

1. You’re planning for your retirement. Find out more about retiring from [Company].
2. Do employees get a day off for Labor Day in 2015? What is the date?
3. You have an older child who is extremely interested in a STEM career. Attending [School] would be a great start. Is there anything [Company] can do to help with tuition?
4. You would like to advance in your current position.
   1. What are the levels for your position?
   2. What skills do you need to move to the next level?
5. You just joined the [Company] dental plan, and your dentist doesn’t work with [Company] insurance company.
   1. Can you continue seeing your dentist? Download the form you will need for your visit.
6. You would like to transfer to a different position within [Company].
   1. Find out what positions are available.
   2. You found a job you want to apply for. The job is in another country. What are the rules about transferring to another office location?
7. [for managers:] You just hired someone who is new to [Company] and will be starting next week. Find out what [Company] expects you to do to help your new hire get started.  
     
   [for non-managers:] A new person just got hired in your group. Your manager asked you to help your new coworker get started. What steps will they need to take in their first few weeks?
8. Your spouse just changed jobs, and their new job is a contract position that doesn’t offer medical insurance.
   1. Can you add your spouse to your health care coverage now, though it’s not the open enrollment period?
   2. Download the form to add your spouse to your health care coverage.
9. You need to take a day off.
   1. Find out what the rules are for taking a personal day.
   2. Request the day off.
10. [for managers:] One of your employees is struggling and has asked to have a coaching conversation with you. Find out more about what you can do to help them.  
      
    [for non-managers:] You’ve just had a review meeting in which you and your manager set your goals for the next year.
    1. Find instructions on how to enter your goals into the system.
    2. Enter your goals into the system.
11. You’re interested in taking your family to King’s Dominion. Find out if there is a reduced rate available for [Company] employees.