

## Part Four: Moderator Guide:

### I. Scripts

Hi \_\_\_\_, my name is \_\_\_\_, and welcome to your session in the TypeForm usability study hosted by the TypeForm Titans group. Before we jump into the session, I wanted to go over a brief outline of what our study is and what the goals of our study are, what your role in this study will be and what you'll be doing today. Please feel free to ask any questions during this time.

Our study hopes to analyze the ease of usability of the form creation software in the platform TypeForm, and we ask select users, just like you, to perform a few tasks while thinking aloud to help us better understand user motives and how the system meets user needs or what it can improve on. This session will take around 35 minutes to an hour to complete depending on the person. I will be serving as the moderator for your session today, \_\_\_\_ will be notetaking, and \_\_\_\_ and \_\_\_\_ will be observing the session on the sidelines.

We want you to remember as we go through these tasks together, there are many ways to complete each task and there is no single "correct answer." We encourage you to try the best of your ability to complete the task in whichever method that feels most intuitive to you, and know that we are not here to judge you or test you, but to see users honest interactions when navigating the TypeForm interface. Your participation in this test is the most valuable when you are being your honest self. Remember, the system is what is being tested- not you!

As long as you feel comfortable with the terms presented thus far, I am going to ask you to sign a consent form for us that outlines some brief information about the study, including what specific data will be collected from you, and what will happen to said data.

If at any point during the session you need to pause or would like to end the session altogether, please don't hesitate to let me know. There are no repercussions or punishments for doing so, and we will follow the mid-session ending procedure.

*[Hand over consent form, answer questions, and obtain signature]*

Perfect, thank you so much. If you're ready then, we will begin with your session now.

To start, we are going to ask that you complete a quick pre-test survey that will assess your current knowledge of TypeForm and any experience using other form creation platforms.

*[Perform the pre-test survey according to the sheet. One of the observers should be ensuring that the study laptop is set up: logged in to TypeForm, recording software open and ready. Have an observer prepared with stopwatch app.]*

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Great! Thank you for your answers. I will be handing you a few pieces of paper that outline the tasks you will be working through today.

*[Hand task sheets face down and already-set-up laptop]*

For the first task, and all tasks following it, we will be recording on the study laptop. We also ask that you speak out loud with what you're thinking as you navigate these tasks. As a reminder, these recordings will only be seen by members of the study group and used only for the purposes of this study. Is it still okay with you that we record your screen interactions and audio?

*[Receive consent, answer questions, and continue]*

Alright, great! Let's start with the sheet titled **Task 1**. Please take your time reading your task and begin whenever you feel ready.

*[Observer begins timing participant with stopwatch when participant starts using laptop for the task. End timing when the task is completed and show note-taker to record task time.]*

*[Participant completes **Task 1: Create new questions on the form to gather the following information.**]*

TASK 1	Notes
<p><b>Create new questions on the form that can gather the following information:</b></p> <ul style="list-style-type: none"> <li>a. What is the form-taker's name?</li> <li>b. What is the form-taker's email?</li> <li>c. What is the form-taker's phone number?</li> <li>d. What is the form-taker's personal website?</li> <li>e. What was the form-taker's favorite part about the class?</li> <li>f. Which of the two photos do you prefer? (insert stock photos from Typeform library) (moderators will redirect user to the "picture-choice" question type after observing first actions if it is not chosen)</li> <li>g. Ask the form-taker to rank the following (use at least two different question types): <ul style="list-style-type: none"> <li>i. How prepared was the instructor for class</li> <li>ii. How engaging was the instructor in the class</li> </ul> </li> </ul>	<p><b>1a-1c</b> should be completed through creating one question slide with the question type: "Contact."</p> <p><b>1e:</b> Users should create a new question using either long text or short text question types.</p> <p><b>1f:</b> Users should create a new question slide with the question type "Picture Choice." Users should type the question "Which of the two photos do you prefer?" (or any similar wording of the same goal) Users should click on the plus signs and add in any stock photo from the Typeform library.</p> <p><b>g1-g2:</b> Users should use opinion scale, ranking, rating, or net promoter score to create these questions.</p> <p>The overall user goal of questions 1-6 are to create a new form according to the needs described and populate it with various described types of questions.</p> <p><u>1a-1c</u> Users may attempt to complete these tasks with 3 individual slides because the question type label of "Contact" does not indicate what information it encapsulates.</p> <p><u>Additionally, there are separate question types for phone number, email, and website, despite 2 of the 3 contact information being in the "Contact Info" question type.</u></p> <p><u>1f:</u> The picture choice question type may be difficult for new users to identify as the quickest way to accomplish this task due to the lack of explanations upon hovering each question type.</p> <p><u>1g:</u> Most users may decide to only use ranking and rating due to net promoter</p>

	<u>score being unexplained to those who do not understand what it is beforehand</u>
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Great, thank you for your work on this task! Now, just to shortly debrief on your thoughts on this task, I want to ask a few questions:

Were there any parts of this task that you found difficult or confusing? Which part would you say was the most difficult if you had to choose one, and what was your thought process in navigating the task?

*[Listen to the participant, notetaker takes notes on answers.]*

Thanks for your answer! Next question, on a scale of 1 to 5, how intuitive do you believe this task was for you- 1 being not intuitive at all, and 5 being the most intuitive?

*[Listen to the participant, notetaker takes notes on answers.]*

Which parts felt intuitive for you? Which didn't?

*[Listen to the participant, notetaker takes notes on answers.]*

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Now, let's move onto **Task 2**.

*[Flip participant onto **Task 2** sheet.]*

Same thing- take your time reading the scenario, and start whenever you're ready!

*[Participant completes **Task 2: Multiple Choice Question and Features.**]*

TASK 2	Notes
Using the multiple choice feature, create a question slide that randomizes the order of the answer choices each time that asks "What is your favorite lecture type?" and the following choices:	Users should create a new multiple choice question and toggle the "randomize" and the "other" option.  <u>Users may struggle to understand that the</u>

<ul style="list-style-type: none"> <li>a. "Flipped-classroom"</li> <li>b. "Asynchronous"</li> <li>c. "Remote Synchronous"</li> <li>d. "Guest Lecture"</li> <li>e. "Powerpoint Lecture"</li> <li>f. "Seminar"</li> <li><b>g. Option for user to input their own answer</b></li> </ul>	<u>"option for user to input their own answer" would be correlated to the "other" option because the label is fairly unclear on the system as to that being the meaning.</u>
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Thanks for your work on this task! Again, we'll go through the same questions as previous:

Were there any parts of this task that you found difficult or confusing? Which part would you say was the most difficult if you had to choose one, and what was your thought process in navigating the task?

*[Listen to the participant, notetaker takes notes on answers.]*

Thanks for your answer! Next question, on a scale of 1 to 5, how intuitive do you believe this task was for you- 1 being not intuitive at all, and 5 being the most intuitive?

*[Listen to the participant, notetaker takes notes on answers.]*

Which parts felt intuitive for you? Which didn't?

*[Listen to the participant, notetaker takes notes on answers.]*

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Doing great so far! Let's move onto **Task 3**.

*[Flip participant onto **Task 3** sheet.]*

Take your time reading the scenario, and start whenever you're ready.

*[Participant completes **Task 3: Matrix Question Type**.]*

TASK 3	Notes									
<p>Using the matrix feature, please create two separate questions that allow form-takers to plot whether they feel the following features of the course were urgent   not-urgent vs. important   non-important:</p> <ul style="list-style-type: none"><li>a. Homework<ul style="list-style-type: none"><li>i. e.g: Please rank Homework on this matrix.</li></ul></li><li>b. Quizzes<ul style="list-style-type: none"><li>i. e.g: Please rank Quizzes on this matrix.</li></ul></li></ul> <p><b>Visual Aid:</b></p> <table><tr><td></td><td>important</td><td>non-important</td></tr><tr><td>urgent</td><td></td><td></td></tr><tr><td>non-urgent</td><td></td><td></td></tr></table>		important	non-important	urgent			non-urgent			<p>Users should create a new matrix question and use the visual aid to accomplish the following:</p> <p>Row 1: urgent</p> <p>Row 2: non-urgent</p> <p>Column 1: important</p> <p>Column 2: non-important</p>
	important	non-important								
urgent										
non-urgent										

*[\*\*If the participant's end matrix does not match visual aid, ask participant to retry.]*

Thanks for your work on this task! Same questions!:

Were there any parts of this task that you found difficult or confusing? Which part would you say was the most difficult if you had to choose one, and what was your thought process in navigating the task?

*[Listen to the participant, notetaker takes notes on answers.]*

Thanks for your answer! Next question, on a scale of 1 to 5, how intuitive do you believe this task was for you- 1 being not intuitive at all, and 5 being the most intuitive?

*[Listen to the participant, notetaker takes notes on answers.]*

Which parts felt intuitive for you? Which didn't?

*[Listen to the participant, notetaker takes notes on answers.]*

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Great! Before we jump into the next question, I just wanted to check in with you and see if you'd like a short 2-3 minute break.




*[Take break if participant asks for as well as water, otherwise continue.]*


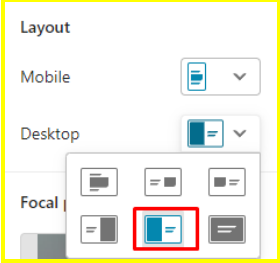
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Alright, jumping right back in, let's take a look at **Task 4**.

*[Turn participant to **Task 4**.]*

Read the task carefully, and start whenever you're ready. Remember to continue thinking out loud to the best of your ability!

TASK 4	Notes
<p><b>Add an image from Typeform's stock library to one of your previously made questions. (Note: choose a question OTHER than the picture-choice question.)</b></p> <ul style="list-style-type: none"><li>a. Flip the image upside down, and turn the contrast up to 100.</li><li>b. Apply the filter titled "Toaster" to the image.</li><li>c. Move it to appear on the left side of the screen.</li><li>d. Edit the alt-text to say "test image."</li></ul>	<p>For 4a-d, users should go to any existing question and click on the "Add" button next to the "Image or video" option.</p> <p>Users should add any image from the "image tab".</p> <p>Users should navigate to the settings option for the photo</p> <div><div>Image or video</div><div></div><div>and the tab titled "adjustments."</div></div>

	<p>Users should flip the image upside down using </p> <p>Users should slide the contrast bar to 100.</p> <p>Users should navigate to the filters tab, scroll down to the “Toaster” filter, apply it, and hit save.</p> <p>Users should utilize the layout feature and move the photo to the left as such:</p>  <p>Users should scroll to the alt text section under the layout section and edit it as guided.</p> <p><u>Users that are not as digitally literate may have difficulty understanding where these fine-tuning functions are on the system due to them being labeled with only icons rather than text labels. Additionally, finding the settings for image or video can be difficult because it is not emphasized and is rather small.</u></p> <p><u>Users may attempt to drag the photo from the default position to the left such as how you do in many other platforms like PowerPoint; however, this interaction is not supported in TypeForm.</u></p>
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[Participant finishes **Task 4: Image Manipulation**]



Awesome job. Same questions!:

Were there any parts of this task that you found difficult or confusing?

*[Listen to the participant, notetaker takes notes on answers.]*

Thanks for your answer! Next question, on a scale of 1 to 5, how intuitive do you believe this task was for you- 1 being not intuitive at all, and 5 being the most intuitive?

*[Listen to the participant, notetaker takes notes on answers.]*

Which parts felt intuitive for you? Which didn't? Were any features harder to find than others?

*[Listen to the participant, notetaker takes notes on answers.]*

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Halfway there! Let's move onto **Task 5**.

*[Turn participant to **Task 5**.]*

Read the task carefully, and start whenever you're ready.

TASK 5	Notes
<b>Use the Net Promoter Score question type to create a question related to course material.</b>	<p>Users should create a new question slide with question type "Net Promoter Score." Users should then type and edit the question</p> <p><u>Users may express confusion with what Net Promoter Score is as opposed to the opinion scale question type. To those who do not know what Net Promoter Score is before coming across the question types, the two question types seem almost indistinguishable.</u></p>

*[Participant completes **Task 5: Net Promoter Score**.]*

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Great! Changing it up with slightly different questions this time:

Have you used Net Promoter Score before?

- **Yes** → please briefly explain your experience with it as well as if you found the TypeForm Net Promoter Score to match up with your expectations given your past experiences with Net Promoter Score (was it easy to use?).
- **No** → based on your interactions with the Net Promoter Score question type on TypeForm, what do you think it is used for- would you use it again?

Thanks for your answer! Next question, on a scale of 1 to 5, how intuitive do you believe this task was for you- 1 being not intuitive at all, and 5 being the most intuitive?

*[Listen to the participant, notetaker takes notes on answers.]*

You're doing so great, let's keep the ball rolling by jumping into **Task 6**.

*[Turn participant to **Task 6**.]*

Read the task carefully and begin whenever you're ready.

TASK 6	Notes
<p><b>Using the branching function, create a set of questions that does the following:</b></p> <ol style="list-style-type: none"><li>Starting question asks if the form-taker is comfortable with their results being shared to the public.</li><li>If yes → New slide that says "Thank you!"</li><li>If no → New slide that asks "Are you sure?"<ol style="list-style-type: none"><li>If yes or no → New slide that says: "Thank you!"</li></ol></li></ol>	<p>Users should create a new question slide with question type "Yes/No."</p> <p>Users should create another slide that says "Thank you!"</p> <p>Click on "Logic" on the right menu bar and select "branching and calculations."</p> <p>Scroll down to find the question and click on "Add rule."</p> <p>The answer would automatically be Yes, so users just need to select "Default end" besides "Then Go to"</p> <p>Users should click on "Add condition"</p> <p>Users need to change the answer to "No."</p> <p>Users should change the Then Go to below answer "No" to the Thank you slide.</p>

	<p>User Goal: making the survey more smooth and engaging to users and participants.</p> <p><u>The user may struggle to navigate the branching feature due to the system bringing up a whole new mini-system inside of the question form that users have to learn to be able to accomplish the task. It can be difficult for users to have to get used to a new interface when they are already learning the basic interface. Despite the branching screen having very little on the screen, it can lead to information overload due to there not being enough guidance.</u></p>
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*[Participant completes **Task 6: Branching logic**]*

Awesome job. Back to the old questions!:

Were there any parts of this task that you found difficult or confusing?

*[Listen to the participant, notetaker takes notes on answers.]*

Thanks for your answer! Next question, on a scale of 1 to 5, how intuitive do you believe this task was for you- 1 being not intuitive at all, and 5 being the most intuitive?

*[Listen to the participant, notetaker takes notes on answers.]*

Which parts felt intuitive for you? Which didn't?

*[Listen to the participant, notetaker takes notes on answers.]*

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Almost finished- would you like to take another short break, or should we power through the last two tasks?



*[Break if participant asks for it.]*

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Alright, let's move into **Task 7**.

*[Turn participant to **Task 7**.]*

Read the task carefully, and begin whenever you're ready. Remember to keep thinking out loud, you're doing great!

TASK 7	Notes
<b>Ensure that the form is accessible. If there are more than 3 accessibility issues, only correct 3 unique issues for test purposes!</b>	<p>Users should open the accessibility menu with the icon: </p> <p>Users should view the contents of the menu, and correct any content that is given a warning</p> <p></p> <p>.</p> <p>Users should explain how they are interpreting each warning and evaluating its clarity.</p> <p>User Goal: Ensuring accessibility guidelines are met with the form.</p> <p><u>Users may struggle with this task because the accessibility menu icon is quite small and can be difficult to locate for unfamiliar users. Additionally, users may struggle with unclear accessibility warnings.</u></p>

*[Participant completes **Task 7: Accessibility**.]*

*[\*If participant struggles to find accessibility menu, ask participant if they know the universal icon for accessibility and if they do: ask them if they see it on the*

*screen anywhere; if not: describe to them (an icon of a circle with a person in it) and ask if they see it on the screen anywhere.]*

Great job! Onto the reflection questions:

Were there any parts of this task that you found difficult or confusing?  
*[Listen to the participant, notetaker takes notes on answers.]*

Thanks for your answer! Next question, on a scale of 1 to 5, how intuitive do you believe this task was for you- 1 being not intuitive at all, and 5 being the most intuitive?

*[Listen to the participant, notetaker takes notes on answers.]*

Which parts felt intuitive for you? Which didn't?

*[Listen to the participant, notetaker takes notes on answers.]*

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Moving onto the final task of this session, let's go on to **Task 8**. You've been a great participant and thank you so much for participating thus far.

*[Turn participant to **Task 8**.]*

As always, take your time reading and begin the task whenever you are ready.

TASK 8	Notes
<b>Make a QR code that links your form. (note: this form will not actually be shared- this is strictly for feature testing purposes!)</b> a. No need to download the actual QR code- just need to locate it!	

*[Participant completes **Task 8: QR code**.]*

Last round of task questions:

Were there any parts of this task that you found difficult or confusing?

*[Listen to the participant, notetaker takes notes on answers.]*

Thanks for your answer! Next question, on a scale of 1 to 5, how intuitive do you believe this task was for you- 1 being not intuitive at all, and 5 being the most intuitive?

*[Listen to the participant, notetaker takes notes on answers.]*

Which parts felt intuitive for you? Which didn't?

*[Listen to the participant, notetaker takes notes on answers.]*

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That concludes our tasks for today! Thank you so much for participating in our usability testing session for Typeform. We appreciate your time and feedback. Before we conclude, we would like to do a post-test interview to gather your thoughts about your experience with the platform. I will ask you five questions, and there are no right or wrong answers.

1. Overall, what are your general thoughts and impressions using Typeform?
2. Which specific features of Typeform did you find most useful or enjoyable?
3. Were there any challenges or difficulties you encountered while using Typeform to complete the tasks?
4. Would you consider using Typeform again for future use of data collection? Why or why not?
5. Is there anything else you would like to share about your experience with Typeform?

*[Listen to the participant, notetaker takes notes on answers.]*

Thank you again for taking your time to participate in this usability test today. Your feedback and insights are valuable to us and will help inform future improvements on Typeform. Please feel free to reach out to us if you have any further questions or concerns!

## **II. Materials**

- A. Consent form
- B. Task descriptions/instructions
- C. Pre-test survey
- D. Post-test interview questions

## **III. Outline of the main steps**

- A. Test introduction and consent form
- B. Pre-test survey
- C. Task scenarios
- D. Post-test interview
- E. Data analysis

## **IV. Full text of questionnaires**

### **A. Pre-test Survey:**

1. On a scale of 1 to 5 (1 being a novice and 5 being an expert), how skilled do you consider yourself in using websites in general?
2. Please describe your level of familiarity with websites that are used to create forms/surveys on a scale of 1 to 5, 1 being not familiar at all and 5 being very familiar.
3. How often do you use tools to create surveys and collect data?
  - a) Very frequently (multiple times per week)
  - b) Frequently (multiple times per month)
  - c) Occasionally (few times per year)
  - d) Rarely (once a year or less)
  - e) Never
4. How long have you been using online tools to create surveys?
  - a) Today is the first time
  - b) Less than 1 year
  - c) 1-2 years
  - d) 3-5 years
  - e) More than 5 years
5. What are your expectations or goals for an ideal data collecting tool?

### **B. Post-test interview:**

1. Overall, what are your general thoughts and impressions using Typeform?
2. Which specific features of Typeform did you find most useful or enjoyable?

3. Were there any challenges or difficulties you encountered while using Typeform to complete the tasks?
4. Would you consider using Typeform again for future use of data collection? Why or why not?
5. Is there anything else you would like to share about your experience with Typeform?



## Consent to Participate in TypeForm Usability Study:

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### **GENERAL INFORMATION:**

#### **What are some things you should know about this study?**

You are being asked to participate in a research study. This study is completely voluntary, and you may choose whether or not to participate. Additionally, you may choose to opt out of this study and revoke your consent at any point without any repercussions.

The purpose of this research study is to gain insight into the ease of use of TypeForm as a platform of form creation.

#### **What data of mine will be recorded in the study?**

Data collected during your session will come in the form of a screen recording captured on a secure laptop that is used for the study purposes, audio recordings, notes taken during your session, and surveys before and after your session. Your data will remain anonymous throughout the study and will not be traced back to you.

#### **What will happen to my data after the study ends?**

Your data will be securely wiped from our servers as soon as the study ends.

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### **AGREEMENTS:**

I agree to participate in the TypeForm usability study conducted by the TypeForm Titans group as a part of the INLS 719 group.

I understand and consent to the anonymous collection of the data forms listed in above sections (screen-recording, audio recordings, notes taken, surveys taken). I understand that this data will only be seen by those working on the TypeForm Titans group and will only be used for the purpose of the TypeForm usability study.

I understand that participation in the TypeForm usability study is voluntary and that my consent can be revoked at any point during the session.

Please sign on the line below to indicate that you have read, understood, and agreed with the information presented to you on this form.

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**Name (Printed)**

**Date**

**Signature**

## Task 1:

**Scenario:** *Imagine you are hired to help out a graduate student in creating a course feedback form for a paid study using TypeForm. The student hands you some papers that contain requirements of what information he needs to gather through the form.*

**Create new questions on the form that can gather the following information:**

- a. What is the form-taker's name?
- b. What is the form-taker's email?
- c. What is the form-taker's phone number?
- d. What is the form-taker's personal website?
- e. What was the form-taker's favorite part about the class?
- f. Which of the two photos do you prefer? (insert stock photos from Typeform library) (moderators will redirect user to the "picture-choice" question type after observing first actions if it is not chosen)
- g. Ask the form-taker to rank the following (use at least two different question types):
  - i. How prepared was the instructor for class
  - ii. How engaging was the instructor in the class

## Task 2:

Using the multiple choice feature, create a question slide that randomizes the order of the answer choices each time that asks “What is your favorite lecture type?” and the following choices:

- a. “Flipped-classroom”
- b. “Asynchronous”
- c. “Remote Synchronous”
- d. “Guest Lecture”
- e. “Powerpoint Lecture”
- f. “Seminar”
- g. Option for user to input their own answer

### Task 3:

Using the matrix feature, please create two separate questions that allow form-takers to plot whether they feel the following features of the course were urgent | not-urgent vs. important | non-important:

- a. Homework e.g: Please rank Homework on this matrix.
- b. Quizzes e.g: Please rank Quizzes on this matrix.

**Visual Aid:**

	important	non-important
urgent		
non-urgent		

## Task 4:

**Add an image from Typeform's stock library to one of your previously made questions. (Note: choose a question OTHER than the picture-choice question.)**

- a. Flip the image upside down, and turn the contrast up to 100.
- b. Apply the filter titled "Toaster" to the image.
- c. Move it to appear on the left side of the screen.
- d. Edit the alt-text to say "test image."

## **Task 5:**

**Use the Net Promoter Score question type to create a question related to course material.**

## Task 6:

**Using the branching function, create a set of questions that does the following:**

- a. Starting question asks if the form-taker is comfortable with their results being shared to the public.
- b. If yes → New slide that says “Thank you!”
- c. If no → New slide that asks “Are you sure?”
- d. If yes or no → New slide that says: “Thank you!”

## Task 7:

**Ensure that the form is accessible.** If there are more than 3 accessibility issues, only correct 3 unique issues for test purposes.



## Task 8:

**Make a QR code that links your form. (note: this form will not actually be shared- this is strictly for feature testing purposes!)**

- No need to download the actual QR code- just need to locate it!