Assess Your Site’s Navigation & Structure

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session url www.gotomedia.com/atlanta00/usability
Cool cover illustration by Eunice Moyle
SESSION OUTLINE

1.0 What is Usability Testing?: Overview
   1.1 Formal vs. Informal Testing
   1.2 Methods of Testing
   1.3 Why Test?
   1.4 User Centered Design
   1.5 Usability Testing Categories

2.0 Testing Basics: It’s Easier Than You Think
   2.1 Step 1: Plan and Prep
   2.2 Step 2: Find Participants
   2.3 Step 3: Conduct Test
   2.4 Step 4: Analyze Results
   2.5 Step 5: Make Recommendations

3.0 Usability Study: UCSC NetTrail

4.0 Online Survey: Wells Fargo Online

5.0 Resources: Reference Material

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Overview

Usability is literally the “ease of use” or understanding it takes to make something work. In this case, Web Site usability is the understanding of how an individual user navigates, finds information and interacts with your Web Site. Unlike online surveys or focus groups, usability testing is a one-on-one process in a “watch and learn” approach. The results of the sessions are used to improve your user’s experience. Having the development team watch the testing and witness the results helps resolve most internal issues in an undisputed manner. You can’t fight the reality of usability testing.

One-on-one Testing

- One to two day process with 4-8 participants
- 1-hour approx. per session
- Pre-determined tasks performed
- Test facilitator watches & takes notes
- Sometimes video taped
- Sometimes watched by development team
- Results show what is working and not working

“Two distinct advantages to formal testing:
- It provides feedback for site development, and it is an educational opportunity for designers and engineers, allowing them to see firsthand the decision-making process of an average site visitor”
- Jupiter 1999
FORMAL VS. INFORMAL TESTING

**FORMAL TESTING**

Formal testing usually takes place in a formal facility with an expert in human factors engineering moderating and running the testing process. Participants are prescreened and selected from a large pool of applicants. There are viewing facilities through a two-way mirror and often complex video monitoring practices.

**INFORMAL TESTING**

Informal testing usually takes place in the participant’s own work environment, or in a casual office setting. Participants are often friends, family or co-workers. A simple test plan and task list is prepared, which is observed and noted by an impartial moderator (usually not an ‘expert’ in human factors engineering.)

**FORMAL VS. INFORMAL Cost Comparisons**

<table>
<thead>
<tr>
<th>Cost Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>Informal Testing, with friends/co-workers</td>
</tr>
<tr>
<td>$300 – $500</td>
<td>Informal Testing, 2-days, outside participants paid $50 - $100 each</td>
</tr>
<tr>
<td>$1,000</td>
<td>Semi-Formal Testing, outside company finds and prescreens participants</td>
</tr>
<tr>
<td>$2,000 – $10,000+</td>
<td>Formal, professional testing with experts laboratory or formal testing environment Human Factors specialists, impartial and consistent. Trained to plan, set up, conduct, analyze and report results.</td>
</tr>
</tbody>
</table>

**COST OF TESTING**

Depending on many factors, usability testing can cost as little as zero dollars, or as much as ten thousand. Informal testing is one-on-one testing with friends and co-workers, observing and taking notes while conducting specific tasks on a site. Formal testing can take many forms, but it is common to have a paid usability consultant who is an expert in human factors engineering, as well as cost of renting a testing facility.

**TAKE THE TIME, MAKE THE TIME**

Conducting usability tests are not usually part of the normal 8-10 week workflow process. More and more companies are realizing the benefits of testing and modifying navigation and structure. Companies with a user focus and an ongoing commitment towards better navigation will see the benefits immediately.
Have Tangible Goals

It is impossible to test all aspects of a Web Site design, architecture and navigation. It is good to break down your site’s needs into individual goals to help determine which testing method is most appropriate. With specific goals in mind, it is easier to tailor your tasks towards a particular area of question.

Use the Appropriate Method

There are many methods for determining if your site is working or not. Most of the testing methods are used early on in the process to troubleshoot against major flaws in design or navigation. Focus groups are helpful for generating opinions and general feedback regarding big picture design issues, navigational issues and overall layout. For more specific questions regarding specific features or areas within the site, usability testing may be more appropriate.

### METHODS OF TESTING

<table>
<thead>
<tr>
<th>Usability Testing</th>
<th>Focus Groups</th>
<th>Online/Email Surveys</th>
<th>Remote Testing</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 – 8 participants</td>
<td>8 – 20 participants</td>
<td>50 – 1000 participants</td>
<td>4 - 8 participants</td>
</tr>
<tr>
<td>assessment/verification</td>
<td>early stages of development</td>
<td>used any time in cycle</td>
<td>assessment/verification</td>
</tr>
<tr>
<td>task/action oriented</td>
<td>representative users</td>
<td>broad-base of users</td>
<td>task/action oriented</td>
</tr>
<tr>
<td>one-on-one interaction</td>
<td>facilitator – group interaction</td>
<td>no direct interaction</td>
<td>remote interaction by phone and video</td>
</tr>
<tr>
<td>results based on observation</td>
<td>opinions and feedback</td>
<td>statistically significant feedback</td>
<td>variable results</td>
</tr>
</tbody>
</table>

**Usability Testing** collects first-hand data through observation. Used early in the development cycle, usability testing exposes product deficiencies and helps clarify and direct (or confirm) development.

**Focus Groups** are used most often early in the development process to get feedback of preliminary concepts. Response from several individuals at once is obtained to see how the representative user thinks and feels about the product.

**Surveys** can be used throughout the development process to understand the preferences of a broad base of users (although mostly used in early stages.) Surveys allow for larger samples and statistically significant feedback. Surveys can be conducted by phone, mail or email.
Identify Problem Areas Early

Usability testing helps to identify problem areas within the site:

- Settle disputes with data instead of guesses
- Provide real feedback with actual users
- Low-cost for valuable results
- What is obvious to you (developer) might not be obvious to the user
- Minimize risk prior to public launch

The Earlier the Better

Conducting tests earlier in the process is cheaper and easier because you are quickly able to identify problems and make changes before you are too far along in the process. Remember, informal testing is better than no testing at all. Testing wireframes or paper prototypes can be done very early in the development process without very much affect on time or budget. Testing an HTML protosite can also bring potential issues to light. While usability testing will not create or perfect a Web Site, it can make sure you are not headed for disaster and identify areas where more attention to information design is needed.
An iterative design and testing approach also allows one to make steady and rapid progress on a project, to learn through empirical evidence, and to ‘shape’ the product to fit the end users’ abilities, expectations, and aptitude.”

- Jeffrey Rubin

Handbook of Usability Testing

User Centered Design

UCD, as it is sometimes referred to, it the practice of designing around the user, to identify specific usability needs and requirements. Sometimes referred to as human factors engineering or ergonomics. Although the study of humans in their environment has been around for decades, there is a new resurgence of testing and procedures to fit the fast growing Internet market. UCD focuses on making the design fit the user, instead of the user fitting the design.

Usability Goals and Objectives
(adapted from Jeffrey Rubin’s Handbook of Usability Testing)

1 Usefulness. The degree to which a site’s design enables a user to achieve his or her goals, and is an assessment of the user’s motivation for using the site at all. It might be easy to use, easy to learn and even free, but if it doesn’t meet any specific goals of the user, it isn’t a successful site.

2 Effectiveness. Referring to ‘ease of use,’ is how quickly and without error specific tasks can be accomplished intuitively.

3 Learnability. The ability for a user to navigate through a site with competence after some period of experience. Is the site easy to navigate the second and third time around?

4 Attitude. Does the user like the site? What is the user’s perception and opinions regarding the site?
Categories of Usability Testing

Usability testing can be broken into three categories. Tests are performed at different stages of the Web development process, each has benefits. The testing we are focusing on Assessment Testing, which is performed to confirm whether a product is usable, learnable and meets the expectations of a representative user. This information helps to shape continued development and identifies problem areas.

Exploratory Test:

- Early in development cycle
- Functional questions in question
- Evaluate effectiveness of specific areas

Assessment Test:

- Easiest to perform
- Typical test for development cycle
- Early or midway into development cycle

Validation Test:

- Late in development cycle
- Determine performance or usability
- Validation prior to release
GETTING STARTED

The tests you conduct don’t need to be complex - stay focused on the goal, and keep the production and cost to a minimum. Identifying problem areas of your site and testing to solve those problems is your goal. You may need several sessions to clarify each issue, and then additional sessions to confirm changes have improved the experience. Don’t get into heavy data analysis, keep it simple.

Objectives of Informal Testing

- Have Specific Goals or Objectives in Mind
- Develop Test Plan (Purpose, problem, profile)
- Create Task List
- Test on a co-worker or friend
- Keep it simple
- Plan on testing in user’s own environment if possible
Develop a Test Plan

Depending on the level of testing you are performing, a simple test plan, a list of questions and a good attitude are all you will need in preparation. For more detailed testing, it is good to have a script ready for introductions, NDA signing and a consent to tape if appropriate. The test plan will vary depending on the type of test and formality desired. A basic test plan should contain the following:

- **Overall Goals/Objectives**
- **Methodology**
  (testing procedure, equipment, facility, etc.)
- **Target Profile**
  (who you will be testing)
- **Testing Outline**
  (orientation, checkoff lists, test questions)
- **Specific Task List**
- **Final Evaluation/Reporting Structure**
  (analysis & recommendations)

Importance of a Test Plan

A test plan offers a chance to create framework for your testing process. It allows for you to communicate your goals and objectives with the client, and align expectations. Start writing the plan in an outline form early in the process, and refine it (and the task list) while you go. Make sure you are focused on specific goals, as you will not have time to test everything.
STEP 1: PLAN AND PREP

SAMPLE TEST PLAN

A test plan does not need to be complex, but it should outline the basic requirements including your overall testing goals, your audience profile, your methodology and testing outline. Include the task list if it is complete, but remember that the testing plan is a work in progress, and may vary from testing to testing. Be sure to have a clear list of tasks which will be performed during the testing period. Also it is helpful to have a test script available to make sure you are not missing out on anything.

Usability Testing Plan:

Goal: Provide specific feedback on search, log-in and online ordering features. Determine expected performance on current site and identify serious problems prior to next phase of production.

Problem Statement: Specific questions which need to be answered are:

1. Are the basic search features intuitive for a new user?
2. Are the advanced search features intuitive to use and learnable?
3. Is the process of ordering clear?
4. Are user log-in and member requirements clear to the user?

User Profile: Participants will fit the target market profile of being versed in current Internet practices and adaptive technology. The target market is Internet users ages 25-45 with moderate to high Internet experience. To qualify, participants should access the Web at least once a week, and should be familiar with basic search and e-commerce functions.

Methodology: Usability testing of 6-8 individuals will be held at an outside testing facility. Each session will take approximately one hour. The test monitor will greet and orient participants. Participants are asked to fill out a basic questionnaire and background information, and nondisclosures will be signed.

Testing Outline:

I. Orientation

II. Background: Testing Site

III. Begin Task List

1. Locate an Italian restaurant that delivers to your office.
2. Place an order to be delivered to your office. (Register)
3. Find a medium priced restaurant with live jazz.
4. Save 3 restaurants to your “favorites” folder.

IV. Fill out post-test survey

V. Debrief Participant

Summary of Results: All participant testing notes will be compiled. Observations and specific findings will be summarized. Other data (Time taken for each task, ability to complete each task, post-testing information) will be summarized.

Recommendations Report: Report will include the complete testing plan and task list, result summary and findings/recommendations. All notes and participant comments will be included.
2.2

STEP 2: FIND PARTICIPANTS

Where to Find Participants
Finding potential applicants is one of the more challenging aspects of conducting usability testing. While co-workers, friends and family members are adequate for various informal tests, it is important to gather an ongoing user-base for use both in focus groups and usability tests.

Test Outside the Team
It is tempting to call your mother or best friend and have them test your site remotely, and email back comments. This is good for an overall survey, but does not yield effective results for usability or navigation. Testing with individuals who are not associated with your company or your site is important. Although setting up sessions and tracking down ideal candidates might seem like a big investment of time you don’t have, the results will be so significant you will realize you should have been testing all along.

Posting an ad online (local job listings) is an easy way to solicit quick results. One such ad may read:

Earn $50 to $100 per hour surfing the Web!
 Participate in ongoing usability and focus group sessions.
 contact information@xxx.com
STEP 2: FIND PARTICIPANTS

GATHER USER PROFILES

Have all potential applicants (from ads and postings) fill out an online or faxed form giving basic demographic information and their Internet usage patterns. Note on all forms that the information provided on this form is confidential, and will not be distributed.
SELECTING TASKS

Developing the right tasks or questions to answer within the site takes time and practice to find out which tasks are suitable for the testing process. If the task is too easy, or too hard, it will defeat the purpose of the session. Pre-test the tasks in-house or with friends before conducting actual tests to weed out potentially difficult or problematic questions.

TEST IT OUT

Before your first test, feel free to test your plan with co-workers or friends, making sure they have a certain level of computer/Web experience, and they have no previous familiarity with the site. The first usability test should be fun, informative and low-stress. Remember, you are here to observe, take notes and be a non-participant. Find out what tasks worked and areas to improve.

Create a Task List

Create a list of tasks or questions which a general user can (hopefully) finish in about an hour. Assign basis time frames to these tasks, although the end results will vary from user to user. Make sure the tasks are not too simple, nor too difficult to accomplish within a reasonable time frame.

Sample Tasks:

1. Order lunch for delivery to your office
2. Create your list of favorite restaurants
3. Order a dinner meal in advance

What Do You Need?

It's really easy: you need a pen, paper, computer and browser. You can add a video camera and also a testing facility, but more than often you can conduct tests within the user's own environment. The one thing which is not easy to find is time. Have a printed version of the site to help with note taking. Be prepared to watch and learn. Usability is never predictable.
**Before the Test**

Hello,

Thank you in advance for your participation in our usability testing. You have been selected based on your online profile. We will contact you via email to confirm the testing dates and your availability. Currently we are scheduled for the 17th and 18th of this month. Testing will be held at our offices downtown, and should take approximately one hour. You will be paid $50 for your participation at the end of the session.

If you have any questions, please do not hesitate to contact us via email or phone. Thanks!

**Orientation**

**Greet the Participant** - Orient to testing and expectations

*Hello, my name is John and I'll be working with you in today's session. I would like to give you a brief idea of what you should expect and why what we are trying to accomplish.*

*Today we are testing the online ordering process and determining how effective and intuitive it is to use. Remember, you are not being evaluated in any way - we are simply trying to see how users navigate through the site. Do your best, but don't be concerned with the results. While you are working, I'll be watching and taking notes, feel free to talk aloud as you go through the site. You may ask questions, but I may not answer them, since it is important for you to go through the site as if I were not present.*

"Afterwards we will have some time to talk about the site and your experience. I will also have a short survey for you to fill out before you leave."

Do you have any questions?*

*(give the NDA form if applicable, and begin the testing.)*

**Begin Task List**

**SAMPLE TEST SCRIPT**

Send an introductory email to testers which fit desired profile, and are willing to participate in the testing. Explain briefly when they will be contacted and what they will be doing, but don't get too specific. The observer will follow up with an email or phone call closer to the confirmed date, and will give direction, watch and take notes, and follow up with evaluation and post-test survey gathering.

FOR THE MODERATOR

Keep neutral during the testing process. Be sure not to give any hints, verbally or by eye or hand motion -- you might be tempted to "rescue" the individual, but this would defeat the purpose of the testing. If the participant asks you a question, respond only if necessary in a very non-specific manner. If the participant becomes frustrated, try to read the level of frustration and note 'failed task' only when all other options are taken.
Conducting the Session

Introduce yourself, explain the process (the user will be asked to perform a set of pre-determined tasks, but don’t tell them how many or how long each one should take) and explain your role as an observer but not a helper. Have an NDA and any other paperwork prepared in advance. Keep the formalities light and make the user feel as comfortable as possible. As a facilitator, you will be a silent observer, speaking only when giving a new task and taking notes throughout the process. Video taping the session is also helpful for later review and to show to other members of the development team.

- Have a NDA ready for signing
- Have batteries charged for your video camera (cords are problematic, set-up should be seamless)
- Have a printout of the site handy for easier note taking (printout pages associated with the task)
- Have your list of sequenced, predetermined tasks
- Have the survey form ready for post-testing
- Stay quiet through the session and do not prompt or help the user in any way

After the Session

Have the payment ready for the user once the session is complete. Pay them after they complete the survey. Prepare a short summary of the session and the results, outlining specific problem areas and surprising results. Include personal observations if appropriate.
Orientation Do's

Introduce yourself, explain why you are here and your role (silent observer). Explain why they are here (to actively participate in a usability study - they are not being tested - there are no wrong answers.) Explain they should 'think aloud' as they feel comfortable. Keep the session relaxed, use humor when appropriate and stay impartial.

Orientation Don'ts

Don't tell them what the tasks are in advance - only that you will be performing a certain amount of tasks in an hour's time. Don't say "this is so easy you'll have no problem" - setting up expectations doesn't help. Don't rescue the participant when struggling - but know when to 'give up' and list as a failed task, when the participant is getting frustrated.

Collect Basic Data

- Could they complete the task?
- Did they need help?
- How much time did it take? (track time throughout testing)
- Stumbling blocks (problems/obstacles)
- Overall observations, commentary

POST-TEST SURVEY

Prepare a survey either online or on paper for the user to fill out after they have completed the testing process. This survey should contain questions about how the user felt overall about the site:graphics, logic, copy/direction, information, navigation and overall satisfaction. Rate each question on a scale of 1-10. Gather data about the overall effectiveness of the site in relation to the goals the site or each task should accomplish.

DEBRIEF INTERVIEW

Let the participant say whatever is on his/her mind. Begin with high-level issues. Move on to specifics (areas you marked in your notes) Thank the participant, pay them for their time. Keep the door open for further correspondence (and even testing!)
Compile & Summarize Data

Gather all data as-you-go. Transfer handwritten notes to computer. Write your reports while the test is still fresh in your mind - create a summary. After testing is complete, summarize all data in one format (grid) showing results of each test, problem areas, comments and user feedback from survey.

Identify Difficulties & Problem Areas

(rank in order of priority & frequency) Identify why there was difficulty or source of problem (identify specific factors, navigation, text, graphic, etc.) Identify global or broad-scope issues. Identify specific task-oriented issues.

AFTER THE SESSION

Depending on the level of testing you are performing, a simple test plan, a list of questions and a good attitude are all you will need in preparation.

For more detailed testing, it is good to have a script ready for introductions, NDA signing and a consent to tape if appropriate. Personally, I feel that the video taping gets in the way and makes the user feel self-conscious ... the choice is up to you.
Compile and Recommend

FINALLY!! Take all information you have compiled and translate into recommendations. Much of the information may validate thoughts you already had regarding your site. Now put it into action.

Concentrate on high-level functionality first (global nav, text links vs. graphic links, page layout, etc.) Then focus on specific areas and recommendations for improved user experience. Divide recommendations into short term and long term goals. Determine implementation plan, staged or phased tasks.

Write up the Final Report

Executive Summary: Brief synopsis of major findings and recommendations, overall benefits.

Methodology: Nature of the research, how it was set up, user profiles, data collection methods, etc.

Results: Display all results, survey feedback etc. in as comprehensive a way as possible.

Findings & Recommendations: General and specific information, short and long term changes recommended, type of change - graphic only, text or back-end programming. Include information about the given task, reason for problem, and recommended solution.

Appendices: Raw data, notes, samples of test materials, background data (no names) for participants, etc.
GROUP TESTING
Performing Usability tests with a group has separate issues than one-on-one testing. While one-on-one testing is a preferred method of gaining specific information regarding navigation and functionality, the process shown here is a combination of face-to-face usability testing observation and also an online survey for feedback.

NON-BROWSING SITE
The UCSC NetTrail is not designed to be an exploratory or browsing-type site. It is a linear presentation of a series of lessons in Web format and designed to be followed in a linear fashion.

3.0 USABILITY STUDY: UCSC NETTRAIL

Project Overview
Developing online literacy is a high priority for school systems, as students learn how to navigate the Web earlier and earlier. In a Beta testing program, UCSC (University of California Santa Cruz) developed the “UCSC NetTrail.” The trail was designed to help incoming students develop Web skills they would need for the new college environment, including Web browsing, e-mail assistance, library resource exploration and newsgroup usage. This project was the first of many credit-based online literacy courses. Usability testing and student feedback was a crucial component to the project’s success.

The Testing Process
After an 8-week development cycle, the first series of usability tests began, using actual students. These tests were performed at the school’s library and observed by various faculty and development team members. Printouts of the site helped to quickly address and identify problem areas, and note taking was performed on selected students and observing issues while navigating through the site. At the end of the testing session, students were asked to fill out a comprehensive online questionnaire. These results were compared to the note taking and observations to form conclusive ideas on changes and improvements in the site prior to public launch.
BEFORE STARTING

Prior to starting the actual testing session, students were given a page of text to review, which gave them some familiarity with the site and the goals of the site.

Students were not given specific tasks for each module; instead, they were asked to go through the entire site as though they were taking the course to give actual feedback.
HOME PAGE

Students were first taken to the homepage which gave a basic overview of the site and showed the site’s navigation: the trailmap.

OBSERVATIONS

Students didn’t know where to click to begin. The graphic at the left was a nice image, but it wasn’t obvious that the circles were clickable. Students clicked on top and side navigation without knowing where they would lead, often taking them out of the area they were currently in, and leaving them confused about how to get back. Students often clicked before completing the entire page, links within the page were often skipped and viewed as optional. The USCS logo was seldom used to return to the home page.
Surveys Feedback

In addition to observation notes, an online survey was provided for student feedback and additional comments. These comments were noted and used to validate the observer’s notes.

Survey Results

The students liked the trail metaphor, and found the directions easy to follow. The students’ felt the content was too lengthy for one sitting and requested modules be offered separately for best results and concentration. Links within the text were not used as they were viewed as optional, and all clickable graphics were asked to be identified as click-
WELLS FARGO ONLINE BANKING

Prior to the complete redesign of Wells Fargo Online Banking, a series of demo sites and user testing processes were implemented to test customer responses and usability of the interfaces being considered.

INITIAL TESTING

After extensive market research into online banking and customer preferences, four options were designed for the first phase of testing (option A shown on this page.)

In a controlled group, users tested the 4 options and in the end a hybrid was created using a combination of options “A” and “B” to move into the next round.

Responses were gathered using Decisive Survey Software. This software uses email-based survey technology which automatically processes answers. (See software review, appendix B)

CASE STUDY: ONLINE SURVEY TESTING

The following is a short case study showing one approach for performing online survey testing within a targeted group. This testing process was facilitated by the Socratic Group — a user testing facility located in San Francisco.

There are many methods of “user testing” and this process is not meant to replace other targeted methods, including one-on-one testing and interviews.
CASE STUDY: ONLINE SURVEY TESTING

2ND ROUND TESTING

For the second round of testing, a hybrid screen was designed using both “quick-link” buttons and a pulldown menu at sign on. While it is recommended to use as little design as possible within the “protosite/demo”, Wells Fargo requested some designed elements. The version shown at the left proved to be too busy and confusing for adequate user testing.

EMAIL QUESTIONNAIRES DEVELOPED

Wells Fargo conducted a series of naming and grouping email questionnaires using the Decisive Survey Software. Users were asked how long they had been banking online, how often signed on, and if the current naming and grouping of information made sense. Customer input was then included in the final “protosite/demo.”

CASE STUDY: ONLINE SURVEY TESTING

To answer a question, type an x between the brackets, like this: [ x ]. For fill-in-the-blanks, type between the brackets like this: [ your response ]. Please make no other changes to this survey.

1. How many accounts do you currently have with Wells Fargo?
   
   Choose one:
   
   [ ] a) One
   [ ] b) Two
   [ ] c) Three
   [ ] d) Four
   [ ] e) Five or more

2. Overall, how satisfied are you with Wells Fargo Online?
   
   Choose one:
   
   [ ] a) 5 (high)
   [ ] b) 4
   [ ] c) 3
   [ ] d) 2
   [ ] e) 1 (low)

Please look at the following groupings A-E and help us choose the best title for each group:

GROUP A: Account Summary | Checking History | Savings History | Market Rate History | Credit Card History | Line of Credit History | Brokerage History | Download Account History | Transfer Funds Between Accounts

5. What would you call GROUP A?
   
   Choose one:
   
   [ ] a) Account Information
CASE STUDY: ONLINE SURVEY TESTING

THE FINAL VERSION

A simplified layout was decided upon, with a 3-step process to help the user through the experience (shown at lower right.) Marketing message spaces and other text items from the previous version were eliminated to allow for more focused testing. This is the final demo (shown at right) which was used for public testing from Wells Fargo Online’s current site. This sub-site was accessible from the current online banking section of Wells Fargo Online.

ONLINE DEMO

The entire site was mocked up in HTML and CGI to allow the user to feel as though they were interacting with the real site. After exploring the demo, users were prompted to take an online survey designed to answer specific questions about the interface and functionality.

SNEAK PREVIEW -- DEMONSTRATION SITE

Thanks for agreeing to give us feedback on the new navigation we’re planning for our site. Please keep the following in mind:

- First, we’re going to have you play with a demonstration site. While doing so, please think about the features of Wells Fargo Online® that you use most often and check out some of the new features like the Menu Bar. We’re going to ask you to compare the demo to your existing site.

- Feel free to spend as much time as you’d like exploring the demo and be assured that it uses “dummy” data that is not connected to your bank accounts in any way.

- You may notice that the demonstration site looks different than the current Wells Fargo Online site. This response time is not at all representative of the actual speed of the Future Website, so please disregard that aspect as you evaluate the site.

- Once you’re finished exploring, please select the “Take Survey” button as shown at the bottom of every screen and tell us what you think. All information will be kept strictly confidential.

WELLS FARGO Online

HOME | EMAIL | HELP

Current Customer Sign-on

1. New Information
   - Social Security
   - Address
   - Phone

2. Account Summary
   - Bill Pay
   - Transfer Funds
   - WellsTrade

Menu Bar

[Back to Banking]  [Enter Demo]

Take Survey

Take the survey and tell us what you think.
CASE STUDY: ONLINE SURVEY TESTING

ONLINE SURVEY

At the end of the demo, users were prompted to access a “take survey button” which took them to this HTML page (shown at left.) The survey was embedded with screenshots of the demo, to help the user recall certain features and functions. Although the Decisive Survey Software was also used to create and tabulate responses from this phase of the project, traditional CGI and other custom survey programming could have been used.

END RESULTS

Over 1,000 customers were able to “Sneak Preview” the upcoming changes to the Wells Fargo Online Banking section, and their comments were carefully documented and were implemented in the actual redesign which was completed and launched 4th quarter of 1998.

CREDITS

xenogroup, inc.
www.xenogroup.com
Decisive Survey
www.decisivesurvey.com
<table>
<thead>
<tr>
<th>Time</th>
<th>Task Description</th>
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