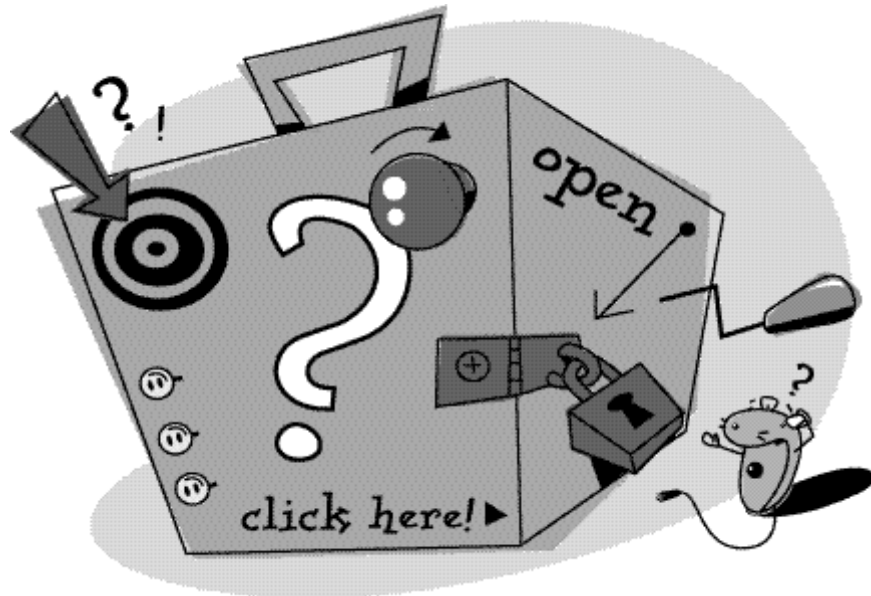


USABILITY TESTING

Assess Your Site's Navigation & Structure



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session url www.gotomedia.com/atlanta00/usability

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**

"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



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

FORMAL VS. INFORMAL TESTING

1.1

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.)

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.

Formal vs. Informal Cost Comparisons

\$0
Informal Testing, with friends/co-workers
\$300 – \$500
Informal Testing, 2-days, outside participants paid \$50 - \$100 each
\$1,000
Semi-Formal Testing, outside company finds and prescreens participants
\$2,000 – \$10,000+
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.

**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.

1.2

METHODS OF TESTING

METHODS OF TESTING

There are several methods of obtaining feedback and user data. Each method has different results and benefits. Several methods can be used during the development process.

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.

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

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.

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.



THE GOAL: START TESTING

It is better to test than not to test. The excuse of "no time and no money" is no longer a valid reason not to include usability testing in your work-flow process.

“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, is 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:

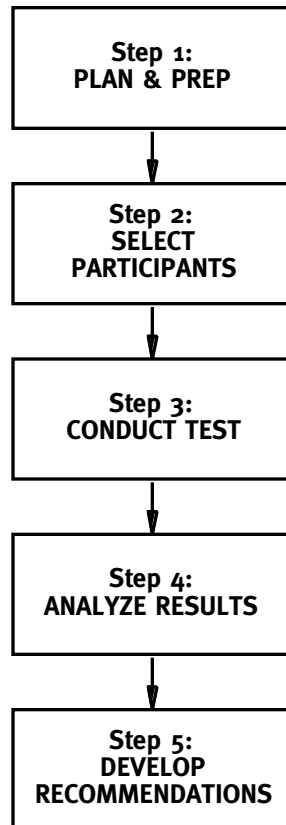
- Late in development cycle
- Determine performance or usability
- Validation prior to release

TEST OFTEN

Get information that can be utilized during the development process. Testing once is good information. Testing again is confirmation. Identifying problem areas before committing time and resources is a tangible benefit to testing as part of the overall development process.

TESTING BASICS: 5-STEP PROCESS

2.0



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 TASKS TO FIT THE SPECIFIC GOAL

Streamline and orient your tasks towards solving a specific issue or question your team has regarding the site. Relate one task to the next in a comprehensive manner, keeping the individual focused on a flow, instead of random tasks.

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.

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 non-disclosures 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.

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.

2.2

STEP 2: FIND PARTICIPANTS

POST TO FIND PARTICIPANTS

Temp Agencies
College Campus'
Office Building
Gym Bulletin Board
Local Email Lists

Usual compensation:
\$50 - \$100

To avoid complications, have cash in an envelope ready to hand the participant after the testing is complete.

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

2.2

Usability/Focus Group Participation

Please fill out the following information for consideration for participation in usability or focus group testing conducted by Red Eye Digital Media. Red Eye will not distribute this information. It is to be used for internal purposes only. After submitting information, your name will be added to a database of possible participants. We will contact you if and when your profile fits a particular testing scenario.

Name:
First Middle Last

Address:

City:

State: Zip: Email:

Work Phone:
Home Phone:

Age: Sex:

Occupation: Income Range:

Frequency Online: Monthly Online Purchases: 1-2 3-5 6-9 10+

Internet Experience: Types of Online Purchases:

Types of Online Activities: Email Chat Newsgroups Games News Education
 Research Music Banking Stocks Shopping Travel

Computer Platform: Macintosh Windows Linux Unix Other

Browsers: Netscape 3.x Netscape 4.x AOL I.E. 4.x I.E. 5.x Other

General Availability: Mornings Afternoons Evenings Weekends

**This information is for internal use only, is strictly confidential and will not be distributed or used for any other purpose than the usability test.

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 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.

SAMPLE TEST SCRIPT

2.2

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.

2.3

STEP 3: CONDUCT THE SESSION

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.

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.

STEP 3: CONDUCT THE SESSION

2.3



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!)

2.4

STEP 4: ANALYZE RESULTS

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 & 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.

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

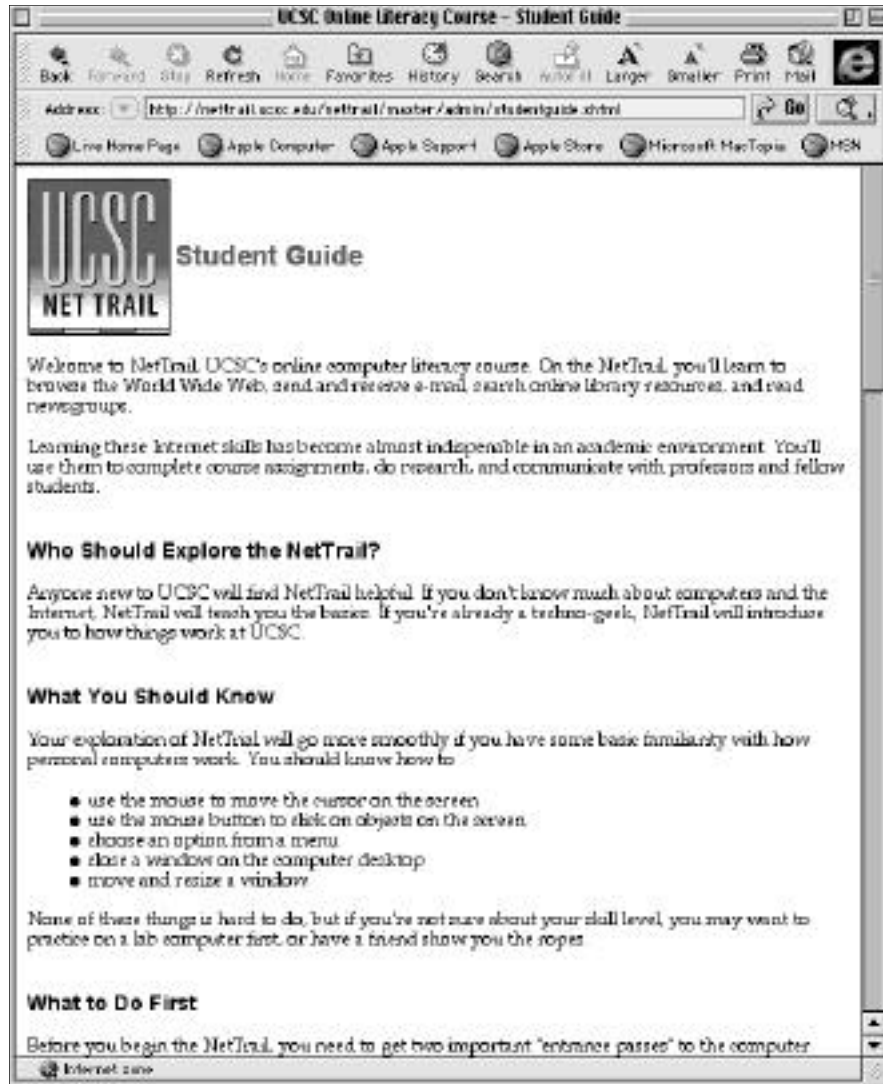
The UCSC NetTrail is not designed to be an exploratory or browsing-type site. It is a linear presentation of a series of lessons in Web format, and designed to be followed in a linear fashion.

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.

3.0

USABILITY STUDY: UCSC NETTRAIL

HOMEPAGE

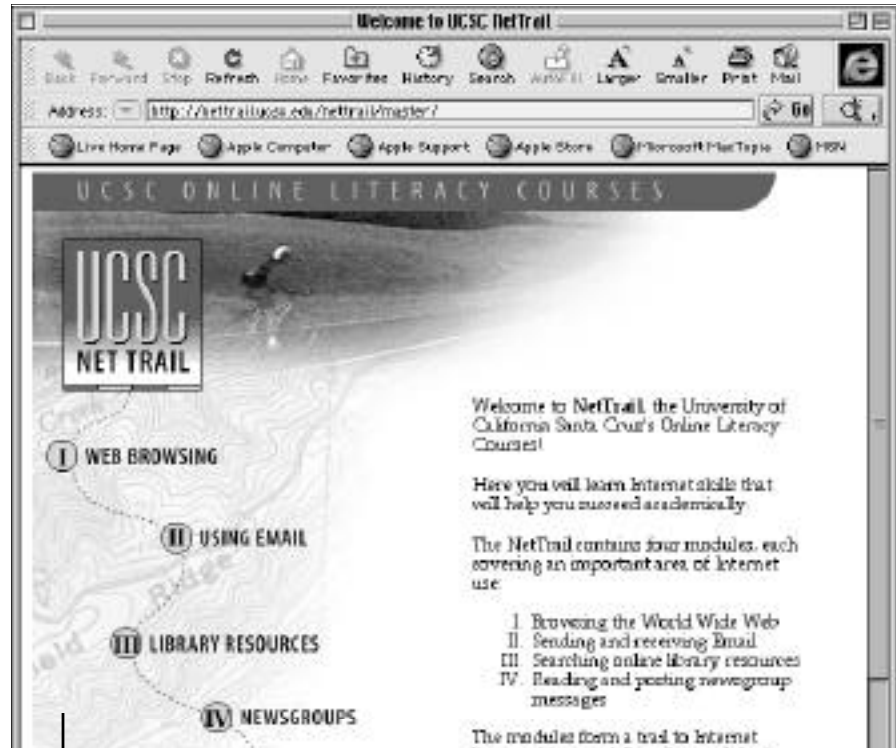
Students were first taken to the homepage which gave a basic overview of the site and showed the site's navigation: the trailmap.

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 UCSC logo was seldom used to return to the home page.



Feedback for UCSC NetTrail
Page 1 of 2

Thank you in advance for taking the time to give us your impressions and feedback on UCSC NetTrail! With your input, we can continue to improve these modules, and make the course more beneficial.

Please answer all the questions below and hit "Advance to Page 2" to advance to the second and final page of the survey.

1. I found the information provided in this module informative and helpful.

Module 1: Web Browsing

Module 2: Using Email

Module 3: Library Resources

Module 4: Newsmaps

2. I found the visual design to enhance my online experience.

Module 1: Web Browsing

Module 2: Using Email

Module 3: Library Resources

Feedback for UCSC NetTrail
Page 2 of 2

Please answer all the questions below and hit "Complete Survey" to complete the survey.

5. What did you learn that would help support your academic work on campus?

6. Were there problems in navigating within the modules? What would help improve navigation?

7. Did you omit the readings and go directly to the exercises on any of the modules? If so, which?

8. What do you like most about the visuals? What could improve the visual design?

SURVEY 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 student's 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-

Results

After the entire study was complete, the observation notes and student feedback notes were compared to find out which areas were problems and required change. Graphically, rollovers or some kind of indicator was necessary to ensure clickability. Content was long and lacked images and flow. Links within the text were confusing. The online literacy program was an overall success, but required finessing to be a truly effective alternate to teaching.

Design/Art Direction: Lisa Lopuck
Producer: Kelly Goto
Electravision, LLC 1998

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.

4.0

CASE STUDY: ONLINE SURVEY TESTING

WELLS FARGO ONLINE BANKING

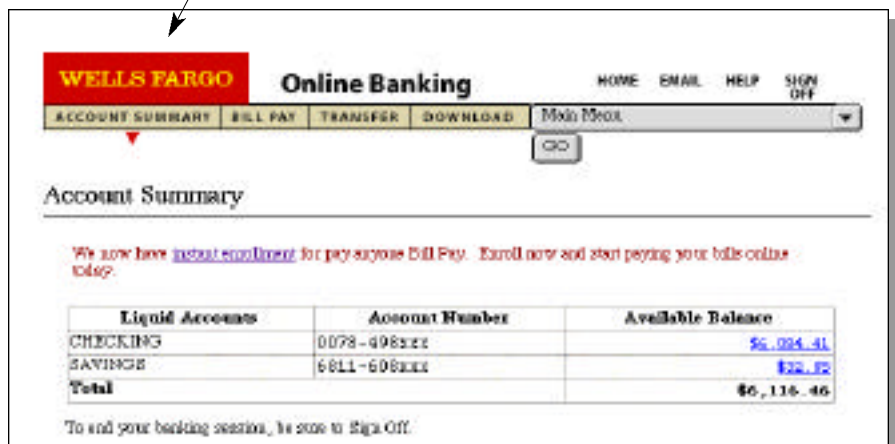
Prior to the complete re-design of Wells Fargo Online Banking, a series of demo sites and user testing processes were implemented to test customer responses and usability of the interfaces being considered.

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

4.0

WELLS FARGO Wells Fargo Online HOME EMAIL HELP

Sign On

Social Security Number

Password

Choose a direct link or select from the pull-down menu below to begin.

Main Menu Bill Pay

Account Summary WellsTrade™

Main Menu

GO

Marketing message here

Marketing message here

Marketing message here

[\[Online Access Agreement\]](#) [\[Security\]](#) [\[Troubleshooting Guide\]](#)

[\[Home\]](#) [\[E-mail\]](#) [\[Help\]](#)

Investment Products:

- Not FDIC Insured
- Not Bank Guaranteed
- May Lose Value

Brokerage accounts available through Wells Fargo Securities, member NASD/SIPC, a subsidiary of Wells Fargo Bank. Brokerage accounts are carried/cleared through EHC Securities Inc. ("EHC"), Member NYSE/NASD/SIPC. Securities products are offered through Fiserv Investor Services, Inc. ("FIS") and investor representatives servicing your account are registered representatives of FIS, Member NASD/SIPC. EHC and FIS are affiliates and neither is an affiliate of Wells Fargo Bank or Wells Fargo Securities.

2ND ROUND TESTING

For the second round of testing, a hybrid screen was designed using both "quick-link" buttons and a pull-down 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."

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

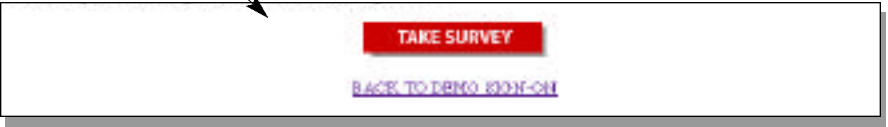
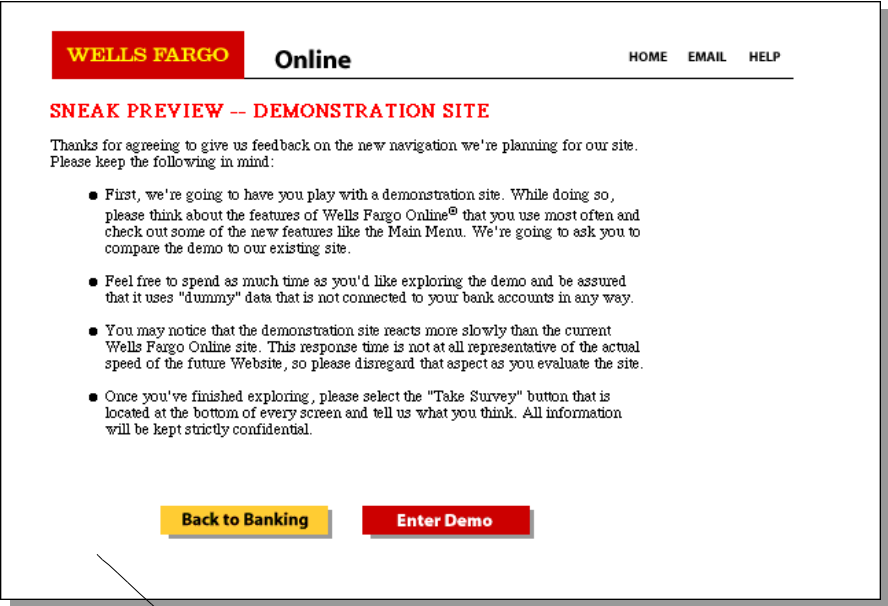
THE FINAL VERSION

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.



CASE STUDY: ONLINE SURVEY TESTING

4.0

The following questions are about the sign-on in the demonstration site.

1. At the sign-on screen, which method of entering the site did you choose first?

Select one.

- The quicklink buttons
 The pull-down menu

2. Which of these statements best describes your preference?

Select one.

- I prefer to use the buttons.
 I prefer to use the pull-down menu.
 I feel comfortable using either one.
 I don't like using either one.

3. How easy is it to use the quicklink buttons?

Select one.

- 5 (Very easy to use)
 4
 3
 2
 1 (Not at all easy to use)

4. Did the buttons function as you expected they would?

Select one.

- Yes
 No, please explain...

5. How easy is it to use the pull-down menu?

Select one.

- 5 (Very easy to use)
 4
 3
 2
 1 (Not at all easy to use)

6. Did the pull-down menu function as you expected it would?

Select one.

- Yes
 No, please specify...

7. Which of these statements best describes your opinion?

Select one.

- The amount of information included in the pull-down menu is overwhelming to me.
 I like having all of the options available to me in one pull-down menu.

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.

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