

Creative Explorer v1.0

Usability Study Plan & Test Kit

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Purpose & Approach

Creative Explorer was launched in the Autumn of 2019. It's a SaaS application that was designed and developed to help Graphic Designers, Copywriters and Marketing Managers view and understand the performance of their digital Ad Creatives that they have published to the different platforms (currently Facebook & GDN). Our goals in testing Creative Explorer is to gain perspective directly from users and apply that data to improve the usability of our product. We also want to better understand how they expect the product to work, what they like and don't like and how we can make it better.

Goals: Determine performance & satisfaction

- Performance (User actions): accomplishing tasks, time it takes to do something, effort - mouse clicks, errors, learnability
- Satisfaction: (User thoughts & words) ease of use SUS baseline score, trustworthy

Methods

We plan to collect information from our test candidates in the following ways.

On Location study: Our product is SaaS application and most likely used in the user's office space. We recommend replicating real-life settings as much as possible rather than conducting lab-based tests. We will administer pre-test questions and introduction to the product before having participants start the tasks portion of the test. Afterwards, we will give them a post-test questionnaire, along with a SUS survey: <https://usabilitygeek.com/how-to-use-the-system-usability-scale-sus-to-evaluate-the-usability-of-your-website/>

Roles: We will need 1 Moderator , 1 Recorder and 1 Stakeholder Observer to conduct and be present for each test.

Pilot study: We first plan to do a pilot usability test with a couple of users that are familiar with our SaaS application to try out our script, questions and surveys. We will get feedback from our participants and adjust as needed before meeting with actual users.

Recruitment: We will recruit 6-8 participants from our internal Creative, PMT & Marketing Teams located in Seattle. We would also like to have 4-6 participants from our existing SaaS & Managed Service Clients. These are most likely remote candidates, so we may need to consider using/purchasing some remote moderation software such as; *Userlytics*, *UserTesting*, *LookBack* etc. If this is possible we could also do a remote Pilot test with internal candidates in our NYC office to iron out any kinks in that process. A stretch goal would be to test Design & Marketing professionals outside of New Engen's Network completely unfamiliar with the tool.

Compensation: If we are able to get access to SaaS, Managed Service clients or other Design and Marketing professionals we will want to provide them with fair compensation for their time

Intro Script

MODERATOR: Hello, and thanks for taking the time to participate in our study. My name is **[moderator name]** and I will be guiding you through the study and this is **[observer and recorder names]** and she/he/they will be observing and recording during the session. I have some information that I will read to make sure everything is covered.

We are currently asking people to test the functionality of our SaaS application to make sure everything works as intended. This session shouldn't take more than 30 minutes.

I also want to make it clear that we are testing the app and not you. In fact, you can't do anything wrong and you can't make any mistakes.

To help us, during this session I will be asking you to think out loud as much as possible. If at any point you get frustrated, don't worry just continue to talk out loud.

If you have questions, just ask. I may not be able to answer them right away, since we're interested in how people do when they don't have someone sitting next to them, but I will try to answer any questions you still have when we're done.

I'm going to keep us moving, but we'll try to make sure that it's fun, too. Do you have any questions before we begin?

Pre-test Questions

(online survey)

MODERATOR: Before we get started I have some questions for you:

- What company do you work for or work with/represent?
- What's your current title and role?
- What tools do you use for your marketing and advertising needs?
- On average how many hours a week do you spend time evaluating Ad Performance?
- What type of computer do you normally work on, what's the monitor resolution?
- Have you ever used Creative Explorer before? (if No, continue to **Initial Impression**)
- If so how many times, how often? (hourly, daily, weekly etc.)
- Have you ever received training or an extensive demo on Creative Explorer?
- What was your main purpose for using Creative Explorer?

Usability Test - Part I

MODERATOR: Please go to web address: <https://platform.newengene.com/367>
Open the **Creative Explorer** application

Initial Impression

I want to know your initial impressions of what you see on the screen. Please take your time to look around (you can scroll and hover, but please don't click anywhere just yet).

- Can you tell me what you see on the screen? What stands out?
- Does what you see make sense to you? Can you talk me through what you expect it to be used for?
- What do the cards at the top of the page mean to you? (point to the KPI tiles)
- What do you think the purpose of these cards are for? (point to the Ad Creative tiles)
- Are you familiar with the terms/acronyms Spend, CPA, ROAS and CTR?
- If so, can you describe what they mean to you.

Tasks

MODERATOR: Thanks! Now I am going to ask you to complete some tasks. **Again, If possible I want to remind you to speak out loud as you perform these tasks, so we can get a better sense of what you are thinking.**

Scenario: You are a designer, copywriter or marketing manager and you have recently launched a bunch of different Ads on some platforms and now you are interested in learning more about how these specific Ads are performing.

1. **Can you find the Ad Creatives that only include copy text with the word "polarized"?**
 - A. Can you describe to me what you noticed that happened?
 - B. Which Ad Creative is performing best? Why?
 - C. Can you tell me how much in total has been spent on these Ads?
 - D. Can you put the Ads in order of worst performing by click-through-rate? (they should hopefully change the sort by, order by)
 - E. Please clear your search

On a scale of 1 to 5 (5 extremely easy) how easy was it for you to complete those tasks?

2. **Now can you narrow down what you are looking at to just video Ads that were placed on Facebook?**

- A. Can you describe to me what you noticed that happened?
- B. Which Ad Creative is performing best? Why?

- C. What's the Average ROAS of all the Ad Creatives?
- D. Can you put the Ads in order of best performing by cost per action? (they should hopefully change the sort by, order by)
- E. Please clear your filters

On a scale of 1 to 5 (5 extremely easy) how easy was it for you to complete those tasks?

Usability Test - Part II

Now can you change the page view from Ad tiles to the Graph Layout view?

On a scale of 1 to 5 (5 extremely easy) how easy was it for you to complete those tasks?

Initial Impression

MODERATOR: I want to know your initial impressions of what you see on the screen. Again, please take your time to look around (you can scroll and hover, but please don't click anywhere just yet)

- Can you tell me what you see on the screen? What stands out?
- Does what you see make sense to you? Can you talk me through what you expect it to be used for?
- Do you understand what the metric intersections on the graph represent? (point to the purple and orange intersections)

Tasks

MODERATOR: Thanks! Now I am going to ask you to complete some tasks. **Again, If possible I want to remind you to speak out loud as you perform these tasks, so we can get a better sense of what you are thinking.**

3. Can you narrow down what you are looking at to just Ad Creatives that have their Campaign Objectives based on Conversions?

Great, and now can you change the Y-axis to ROAS and the X-axis to Spend?

- A. Can you hover over the Ad Creative that is performing the worst?
 - Why did you select that one? Can you tell me if this Ad Creative is performing better than average?
- B. Can you put the Ads in order of best performing by cost per action? (they should hopefully change the sort by, order by)
- C. Can you hover over the Ad Creative that is performing the best?

- Why did you select that one? Can you tell me if this Ad Creative is performing better than average?

D. Please clear your filters

On a scale of 1 to 5 (5 extremely easy) how easy was it for you to complete those tasks?

MODERATOR: *Thank you for your participation in the usability testing of Creative Explorer.*

Before we ask you to complete the questions and surveys on the following pages, Do you have any questions for me?

Thanks again and we appreciate your feedback!

Post Test Questionnaire

(online survey)

- What were your impressions on using Creative Explorer?
- Do you have comments on the look & feel or aesthetics of Creative Explorer?
- What did you like most about the website and your experience?
- What, if anything, frustrated you most?
- How would you describe Creative Explorer in one or more words?
- Do you have recommendations that you would like to share on how we can improve the design of Creative Explorer?
- Did the Search & Filtering make sense to you?
- *Did the layout of the page content make it easy to understand the content that was most important to you?*
- *Would you be interested in participating in other sessions like this one in the future?*

Data Logging Sheet

Participant Identifier: _____

Task 1:

Part A	Part B	Part C	Part D	Part E
Task Issues	Task Issues	Task Issues	Task Issues	Task Issues
Time to completion	Time to completion	Time to completion	Time to completion	Time to completion
Quotes:	Quotes:	Quotes	Quotes	Quotes

Additional Comments:

Participant Identifier: _____

Task 2:

Part A	Part B	Part C	Part D	Part E
Task Issues	Task Issues	Task Issues	Task Issues	Task Issues
Time to completion	Time to completion	Time to completion	Time to completion	Time to completion
Quotes:	Quotes:	Quotes	Quotes	Quotes

Additional Comments:

Participant Identifier: _____

Task 3:

Part A	Part B	Part C	Part D
Task Issues	Task Issues	Task Issues	Task Issues
Time to completion	Time to completion	Time to completion	Time to completion
Quotes:	Quotes:	Quotes	Quotes

Additional Comments:

Consent & Recording Release Form – Adult

To be completed prior to the usability test by all participants.

I agree to participate in the study conducted and recorded by New Engen.

I understand and consent to the use and release of the recording by New Engen and I understand that the information and recording is for research purposes only and that my name and image will not be used for any other purpose. I relinquish any rights to the recording and understand the recording may be copied and used by New Engen without further permission.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator, and I may terminate my participation in the study at any time for any reason.

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date: _____

Please print your name: _____

Please sign your name: _____

Thank you!

Non Disclosure Form

To be completed prior to the usability test by all participants. May be excluded or substituted from the test kit at the discretion of New Engen.

1. Usability Testing Program: You have agreed to participate in a Usability Testing Program for Creative Explorer. The company shall subsequently be referred to as New Engen.
2. Confidentiality Obligations. During Your participation in the usability testing, New Engen may provide access to confidential and proprietary information ("Confidential Information"). Such Confidential Information may include, but is not limited to, information relating to the development, marketing or distribution of released or unreleased versions of New Engen products, technologies and/or services, and any other non-public information disclosed by New Engen. You agree to hold all Confidential Information in trust and confidence for three (3) years from termination of this Agreement, or until such time as the Confidential Information is publicly disclosed by New Engen, whichever comes first. During this period, You agree to treat the Confidential Information with the same degree of care as You treat Your own confidential and proprietary information, but no less than a reasonable degree of care, to prevent the unauthorized use, dissemination or publication of the Confidential Information. You also agree to use the Confidential Information solely as necessary to participate in the Usability Testing Program for the New Engen Product.
3. Use of Comments. During the Usability Testing Program, You may from time to time provide to New Engen suggestions, comments, ideas, or other technical information regarding New Engens' Confidential Information or any New Engen product, which may embody such Confidential Information ("Feedback"). New Engen shall be free to use, disclose, reproduce, license or otherwise distribute, and exploit the Feedback provided to it as it sees fit, entirely without obligation or restriction of any kind on account of intellectual property rights or otherwise.
4. Recorded Sessions. You agree that Your image and/or voice may be recorded in any medium ("Recorded Media") during the usability testing. You agree that New Engen may display, perform, modify, and copy the Recorded Media in any manner and via any media New Engen chooses, without reference to its source or obligation to You.
5. Voluntary Participation. You understand that participation in the Usability Testing Program is strictly voluntary and New Engen is not obligated to provide compensation. Either You or New Engen may, at any time, terminate Your participation. Upon termination, Your obligations under this Agreement will still be in full force and effect.

6. No Obligation to Purchase or Offer Products. Neither party has an obligation under this Agreement to purchase or otherwise acquire any service or item from the other party. New Engen has no obligation under this Agreement to commercially offer the New Engen Product or any other product or service.

7. General. This Agreement sets forth the entire agreement with respect to the subject matter hereof and supersedes all prior or contemporaneous agreements concerning such subject matter, whether written or oral. All additions or modifications to this Agreement must be made in writing and must be signed by both parties. Any failure to enforce any provision of this Agreement shall not constitute a waiver thereof or of any other provision. In case any provision of this Agreement shall be invalid, illegal or unenforceable, the validity, legality and enforceability of the remaining provisions of the Agreement shall not in any way be affected or impaired thereby. You may not assign this Agreement or any of the rights granted herein without the prior written approval of New Engen. This Agreement and all matters arising out of or relating to this Agreement shall be governed by the laws of the state of California without regard to its conflict of laws rules. Any legal action or proceeding relating to this Agreement shall be instituted in any state or federal court in Seattle or King County, Washington. You and New Engen agree to submit to the jurisdiction of, and agree that the venue is proper in, the aforesaid courts in any such legal action or proceeding.

BY ACKNOWLEDGING BELOW, You acknowledge that You have read and understood the terms of the Agreement and agree to be bound by the terms of the Agreement. The Effective Date on this Agreement shall be the date of the acknowledgement.

Date: _____

Please print your name: _____

Please sign your name: _____