Introduction

This plan describes the usability test that the Human Factors Engineer will conduct to evaluate the design changes for the [Company] website [URL here]

Field studies are a form of qualitative research in which a small number of representative users are observed as they perform routine tasks, both offline and online using the web site. This approach builds an awareness of relevant user needs, what processes, inputs and outputs are used along with an understanding of how well the existing interface meets users' needs and expectations. This plan describes the study:

- Purpose
- Methodology
- Participant Profile
- Materials

Purpose

The purpose of the field study is to address specific issues of the four top priorities for the 2.0 release. These priorities were identified by the Project Acceptors, [Name] and [Name], during a January 29th meeting with key stakeholders from [Group]. The priorities for the release are identified as:

- Join the Program Once
- Redesign Member Pages
- UI Admin Improvements
- Scorecards

Objectives

To help us shape the conceptual framework, the specific objectives of the study are to make contact with stakeholders, both internal and external, who can share their experiences and knowledge. We will work to:

- Gather ideas for ways to streamline the application process and allow people to join the program once
- Create approaches for redesigning the member pages
- Develop UI improvements that could make the internal administrative process function more efficiently
- Build an understanding for the development of the scorecard concept

Methodology

Our methodology is designed to enhance communication and build trust with the stakeholder. The facilitator will first ask the participating stakeholder to answer a few brief background questions. Then, the facilitator will describe to the participant what is expected of him/her during the session. The participatory design session is conversational and a separate series of standard questions will be asked of internal and external stakeholders (See Appendices). Responses will be documented. Participants will be asked to demonstrate their regular routine in using the site while being observed. During this portion of the session, participants and facilitators will collaboratively create models which capture tasks, triggers, sequences and intentions of the users. Each field study should take no more than an hour.

Observational Approach

An unbiased, objective approach is used when observing stakeholders. Field studies help us understand the context of use. We will observe how target stakeholders integrate their interactions with the [Name] Program into their everyday work lives. Observing stakeholders in their environment provides an opportunity to learn about current behaviors and attitudes and how existing services are being used today.

People Involved

In order to establish a true human-centered design, all stakeholders must be involved. We have identified two primary segments of targeted end-users:

People using the [Name] Program (external)

People managing the experience for the [Name] Program (internal)

We want to reveal the structure of how the work practices are organized. We want to understand the work itself, the triggers, the sequences and the intent that is implied by the user's actions and the artifacts that result.

People using the [Name] Program (external)

Independent Software Vendors are the external users. It is our current understanding that they fall into two general groups: high touch and low touch. The business model surrounding high touch ISVs is different from low touch. Part of our discovering process will be to learn what these differences are and how that affects the inputs and outputs of the site. Essentially, we will need to talk with representatives from both the high-touch and low-touch groups.

Note: In order to follow [Company]'s Best Known Methods, the X legal processes should be taken into account. At least one representative from Legal should be consulted about how their processes integrate into the customer touch points.

The Study

The approach and methodology will be relatively the same for both study groups.

For people using the [Name] Program (externally), the study will be conducted in the following order:

- Orientation
- Background questions
- Walk-thru of current X site
- Debrief questions

For people managing the experience for the [Name] Program (internal), the study will be conducted in the following order:

- Orientation
- Background questions
- Sequence Modeling
  (triggers, sequences and intent)

Results

The results of the field study will be presented in a brief report that summarizes the findings and recommendations.