



Tainotek Usability Research & Recruitment Plan

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Background

With increasing demand for Tainotek's services, research is needed to understand what changes, if any, should be made to create a user friendly and frustration free lead submission process. This UX consultant seeks to test the current design to determine success and/or additional need for improvement.

Purpose

Run a usability test to identify any pain points during the process of a user coming to the Tainotek's website to submit a lead and note any points of confusion.

Project Goals and Metrics

- **Goals & Vision**
 - Generate domestic organic growth as the 'go-to' UX consultant and training company
 - Create and maintain reputation that Tainotek is proactive, informative, and easy to do business with
- **Metrics to Improve**
 - Conversions (successful lead submissions)
 - Bounce rate



Research Goals

- Uncover the primary usability barriers to submitting a lead form successfully:

Methods

Research Questions. The study will collect qualitative data to answer several research questions, including:

- **Tasks**- How well does the site support our users' ability to accomplish key goals and tasks?
- **Navigation and information architecture** – How does the site structure support users' ability to accomplish their tasks? Can they navigate to where they want to go and accomplish their tasks quickly and efficiently? What pathways do they take?
- **Content and terminology** – Do users understand the content and does it help them accomplish their tasks?
- **Layout and visual design** – What are the users' impression of the visual design?
- **Communication and site impressions** - What are our users' overall impressions of the site? Does it adequately communicate what users can/are required to do with the site?
- **Audience.** We will conduct the study with 2 participants who represent a spectrum of usage behaviors.

To answer the above research questions, we will:

- Conduct remote, recorded, moderated usability test sessions with 2 participants
- Deliver a summarized findings report.

Timeline

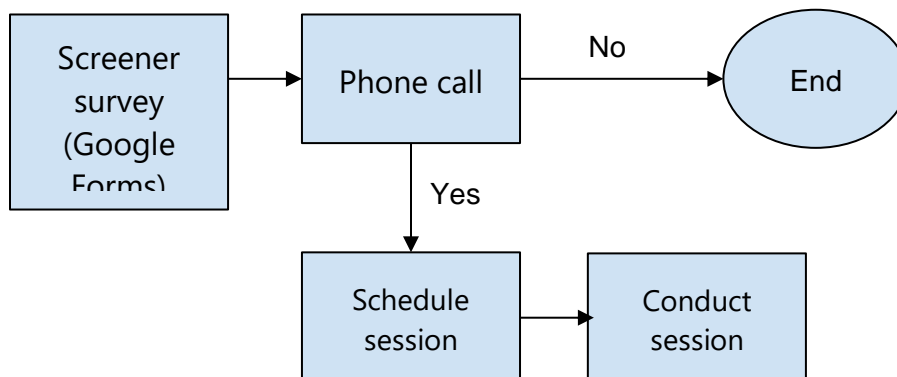
Nov 26 Kickoff call with Matt (representing Tainotek's stakeholders).

- Dec 4 Lia delivers Research Plan (this document) draft to Tainotek for review and approval.
- Dec 6 Tainotek provides feedback and/or approval on Research Plan to Lia. Lia makes revisions as needed.
- Dec 9 Lia drafts usability testing script and delivers draft to Tainotek for review and approval.
- Dec 9 Launch recruiting.
- Dec 11 Tainotek provides feedback and/or approval on usability test script. Lia makes revisions as needed.
- Dec 12-13 Phone screen and schedule participants.
- Dec 14-15 Lia conducts and record usability tests.
- Dec 20 Lia delivers summary findings report.

Recruiting Plan

Workflow

- Users will be recruited from my professional network on LinkedIn based on the criteria defined below.
- Recruits will be screened to ensure audience fit.





Recruiting Criteria

- Responsible for seeking vendor partners of consultants from medium to large size companies
- Falls into the following professional categories: Design Managers, Product Owners, VP of Design or Participants, Job Seekers, Other Related
- Prioritize Design Managers, Product Owners, and VP of Design
- If possible, mix of genders and ethnicities

Screener Survey

Demographics

1. What is your gender? (aim for a mix)
 - Male
 - Female
 - Other: _____
2. Please specify your ethnicity (aim for a mix)
 - White
 - Hispanic or Latino
 - Black or African American
 - Native American or American Indian
 - Asian/Pacific Islander
 - Other: _____

Industry Questions

3. Which of the following is true?
 - I am the main person responsible for seeking vendor partners of consultants. (ACCEPT)
 - I share the responsibility of seeking vendor partners of consultants (ACCEPT)
 - Someone else usually handles the process of seeking vendor partners of consultants (REJECT)



4. What is your current position?

5. Which of the following is true?

- I am actively seeking a UX Consultant to partner with (ACCEPT)
- I am interested in learning more about a UX Consultant, but not ready to partner (ACCEPT)
- I am not actively seeking nor interested in a UX Consultant to partner with (ACCEPT-due to timeline)

6. Those taking part in the interviews will speak with a member of our team on the phone and have their screen activity recorded during the session. Recordings will be used for internal purposes only. Are you comfortable with this?

- Yes (ACCEPT)
- No (REJECT)

Research Day Schedule

Dec 14 Phone Interview 1

Dec 15 Phone Interview 2

Testing Script

Pre-Interview

Hi, thank you so much for participating in this review. Today we will be looking at Tainotek's website.

What I'd like to do today is walk you through the current website and get your initial impressions and answers to some questions. I'd like for you to **be completely honest** – you will



not hurt my feelings, so please be very honest with your opinions and reactions. Remember, **we're testing the website, not you**, so there are no wrong answers.

As we go along, I'm going to ask you to **think out loud**, to tell me what's going through your mind. Please read everything you see out loud. I may remind you to do this. I am not trying to bug you, we just really want to know what you are thinking.

If you have questions, just ask. I may not answer a question 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.

Finally, we would like to **record this session** if that is ok with you. The video will be used only to help us figure out how to improve the site, and it won't be seen by anyone except the people working on the project. It also helps me, because I don't have to take as many notes.

Do you have any questions before we begin?

Background Questions

1. Do you currently use any Usability Testing, Custom User Research, or Trainings and Sprint services?
2. Who is your current UX services company?
3. Who in your company is responsible for researching and partnering with UX services?
4. Can you tell me a little bit about how you choose who to partner with? For example, what is the process you go through to find a potential UX partner?
5. What is the most frustrating part of this process?
6. *Topics to probe on if not addressed above:*
 - a. Is there a specific service you look for when choosing a UX partner?
 - b. Is there anything that would stop you from pursuing a partnership with Tainotek?
 - c. What information would you need to know before contacting Tainotek?
 - d. What information would you expect to receive if you submitted a contact form to Tainotek?

Usability Test



1. Provide link: www.tainotek.com
2. You are coming to this page to research the possibility of bringing UX services into your organization. What is your first impression of this page?
 - a. *Probing questions:*
 - i. How did that compare to what you're used to, or what you expected?
 - ii. Was anything confusing or frustrating?
3. Does the home page organization make sense?
4. What would you want to see on this page to help you find information on any provided UX services?
5. Imagine that you are interested in learning more about Tainotek's programs and offerings. Specifically, you want to know if they offer workshops. **Can you show me where you would go to find this information?**
 - a. *Probing questions*
6. Now imagine that you're interested in potentially partnering with or learning more about Tainotek. **Can you show me how you would go about doing that?**
 - a. *Probing questions*

Post-Interview

1. How did that process go for you overall?
2. How did this compare to your expectation of how this process would work?
3. What are the most important things you would want to see?
4. What type of information would you look for?
5. What are two things that you really liked or found useful?
6. What are two things that you found frustrating or confusing?

Thank user for their time and inform them of how and when they will receive their incentive (gift card).