

# Usability Test Package

## Welcome!

Thank you for agreeing to participate in this usability test. Your participation will help us improve the design of the user interface of this site. Your feedback will tell us how well we are doing in meeting your needs. Before we begin, we would like to describe the test situation to you.

Today, you will:

- Fill out a background questionnaire
- Practice thinking aloud
- Perform a set of tasks by yourself
- Complete a follow up questionnaire.
- Participate in a discussion to provide suggestions for improvement.

We will be working with a nearly complete version of the site. We are interested in your opinions. By watching you interact with the site, and by having you tell us what you like and don't like, we will be able to identify changes that can be made to develop a more effective user interface. Please “think aloud” as you go through the scenarios; tell us what you are thinking and ask any questions you may have.

There will be user training available when this site released. However, today we would like you to try some tasks yourself so that you can help us identify things that are not as clear as they should be. Please remember that you are evaluating the system—we are NOT evaluating you, your abilities, or your knowledge of the site. No one's individual performance will be reported.

There may be other people observing as we do the usability test. They will keep your comments in confidence, so please feel free to say whatever you think. We will create a summary report about the usability test; however, this report will not describe how any one person performed in the test. The report will summarize all of the users' feedback. We may record your session. The recordings are the property of the project and will be used for analysis and reporting purposes only. If we want not be using the recording for educational purposes; we will ask your approval to use any segment of the recording on which you appear for any purpose beyond analysis and reporting.

Finally, this is a voluntary session. We appreciate your help, and if for any reason you feel you should not continue with the session, you are free to leave.

With your help, we will be able to make these functions easy to learn, easy to use, and more useful. Again, thanks for joining us today, and we hope this is a worthwhile experience for you.

# Usability Testing Consent Form

## Understanding Your Participation

**Please read this page carefully before you sign it.**

You have agreed to participate in a usability study (the “study”) that will evaluate the Broker-Dealer Center. By participating in this study, you will help us to improve the Broker-Dealer Center in future redesigns such as improved navigation, descriptions or functionality.

You understand and agree in connection with your participation in this study that members of the home office staff will observe you and record information through written notes as well as video and sound recordings as you work with the Broker-Dealer Center. You agree to complete a questionnaire about your experience and answer follow-up questions.

You understand and consent to us using the data from your study session, including sound recordings and videotapes, for the purposes of evaluating the Broker-Dealer Center and sharing the results of these evaluations with our personnel, including the IT department, as well as with other business units and outside consultants. The recorded results of this study will not be used for training or marketing, but only for the purposes of improving the Broker-Dealer Center.

By signing this form, you give your permission for us to use your recorded voice, a videotape of the session and any oral statements.

If you need a break at any time, please inform the study facilitator. If you have questions about how the session will proceed, you may ask them at any time. You may withdraw from your study session at any time.

If you agree with these terms, please indicate your agreement by signing below.

Signature: \_\_\_\_\_

Print name: \_\_\_\_\_

Date: \_\_\_\_\_

## Please complete this form before we begin

1. What is your position?

- Administrative Assistant
- Rep
- OSJ

2. What age bracket do you belong to? (Need a cross section of users from different age groups ½ older than 50 and ½ younger)

- Under 26
- 26 -38
- 39 – 50
- 51 – 63
- Over 64

3. How frequently do you use the VFC/RepWorks?

- Once a month or less
- Once a week
- 2-3 times/week
- Everyday

4. How frequently do you use websites, besides the VFC/RepWorks, for your business?

- Once a month or less
- Once a week
- 2-3 times/week
- Everyday

5. How much time do you spend on the Internet each week? Do **NOT** include time you spend working with email?

- 1 hour or less
- 2-5 hours
- 5-10 hours
- 10 hours or more

6. When you have problems with your computer equipment **at home**, not the office, what are you **most likely** to do to fix the problem? Please read all the choices then choose one answer that is what you are **most likely to do**. (*Read through the list and prompt them to choose only one answer*)

- Get someone you know to fix it for you.
- Return it to the store or manufacturer without trying to fix it.
- Get someone you know to teach you how to fix the problem.
- Call the manufacturers technical support for help.
- Use manuals to try and figure out how to fix it yourself.
- Use the Web to try and figure out how to fix it yourself.
- Try to fix the computer equipment without any help.

## **Thinking Out Loud**

Please tell us what you are thinking as you do your tasks. If you are reading anything—on the computer screen or on paper—please read it out loud.

Tell us if anything comes to mind that you don't understand or that you think is particularly easy to understand. Your comments will help us understand the usability of the website we are evaluating.

The facilitator will be nearby, but might not be able to answer your questions.

## Usability Test Scenarios and Tasks

1. Exploring the Home page
2. Locate a blank account information form
3. Determine the date of an event or meeting
4. Add an item to your favorites
5. View new items
6. Locate a Click 'n Play
7. View the Advisory Quarterly Reporting
8. Go to ING SmartWorks
9. Post-test questionnaire
10. Debriefing
11. Thank you!

## **Task 1: Exploring the home page**

Take a few minutes to explore the home page of the Broker-Dealer Center.

## Task 2: Locate a blank account information form

You are looking for a new account form. Use the website to locate that form.

- Do you understand the task?                      No                      Yes
- Is it a task you do at work?                      No                      Yes
- How important is this task?                      Low    Med    High    Other: \_\_\_\_\_
- How frequently do you do this task?            Never    Seldom    Often    Other: \_\_\_\_\_
- Tell us when you are ready to begin.
- Complete this task as quickly and accurately as you can.
- Tell us when you have completed the task.

**Task 2: Locate a new account form**

Based on your experience doing this task:

1. How confident are you that you successfully completed the task?

- |                  |             |                      |         |                    |           |                |
|------------------|-------------|----------------------|---------|--------------------|-----------|----------------|
| 1                | 2           | 3                    | 4       | 5                  | 6         | 7              |
| Very Unconfident | Unconfident | Somewhat Unconfident | Neutral | Somewhat Confident | Confident | Very Confident |

2. How satisfied are you with your experience in using this website to complete this task?

- |                   |              |                       |         |                    |           |                |
|-------------------|--------------|-----------------------|---------|--------------------|-----------|----------------|
| 1                 | 2            | 3                     | 4       | 5                  | 6         | 7              |
| Very Dissatisfied | Dissatisfied | Somewhat Dissatisfied | Neutral | Somewhat Satisfied | Satisfied | Very Satisfied |

3. Compared to the way you do this task now, this tool is ...?

- |                |           |                    |         |               |      |           |
|----------------|-----------|--------------------|---------|---------------|------|-----------|
| 1              | 2         | 3                  | 4       | 5             | 6    | 7         |
| Very Difficult | Difficult | Somewhat Difficult | Neutral | Somewhat Easy | Easy | Very Easy |

4. What do you LIKE most about what you just did?

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5. What do you DISLIKE most about what you just did?

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Tell us when you are ready to begin the next scenario ...

### Task 3: Find an event

You'd like to attend the ING SmartWorks event or meeting on August 14th, view the details of this event.

- Do you understand the task?                      No                      Yes
- Is it a task you do at work?                      No                      Yes
- How important is this task?                      Low    Med    High    Other: \_\_\_\_\_
- How frequently do you do this task?            Never    Seldom    Often    Other: \_\_\_\_\_
- Tell us when you are ready to begin.
- Complete this task as quickly and accurately as you can.
- Tell us when you have completed the task.

### Task 3: Find an event

Based on your experience doing this task:

1. How confident are you that you successfully completed the task?

1	2	3	4	5	6	7
Very Unconfident	Unconfident	Somewhat Unconfident	Neutral	Somewhat Confident	Confident	Very Confident

2. How satisfied are you with your experience in using this website to complete this task?

1	2	3	4	5	6	7
Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Satisfied	Very Satisfied

3. Compared to the way you do this task now, this tool is ...?

1	2	3	4	5	6	7
Very Difficult	Difficult	Somewhat Difficult	Neutral	Somewhat Easy	Easy	Very Easy

4. What do you LIKE most about what you just did?

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5. What do you DISLIKE most about what you just did?

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Tell us when you are ready to begin the next scenario ...

#### **Task 4: Add an item to your favorites**

You'd like to add the Books And Records - Retention Requirements to your favorites.

1. Do you understand the task?                      No                      Yes
2. Is it a task you do at work?                      No                      Yes
3. How important is this task?                      Low    Med    High    Other: \_\_\_\_\_
4. How frequently do you do this task?            Never    Seldom    Often    Other: \_\_\_\_\_
5. Tell us when you are ready to begin.
6. Complete this task as quickly and accurately as you can.
7. Tell us when you have completed the task.

### Task 4: Add an item to your favorites

Based on your experience doing this task:

1. How confident are you that you successfully completed the task?

1	2	3	4	5	6	7
Very Unconfident	Unconfident	Somewhat Unconfident	Neutral	Somewhat Confident	Confident	Very Confident

2. How satisfied are you with your experience in using this website to complete this task?

1	2	3	4	5	6	7
Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Satisfied	Very Satisfied

3. Compared to the way you do this task now, this tool is ...?

1	2	3	4	5	6	7
Very Difficult	Difficult	Somewhat Difficult	Neutral	Somewhat Easy	Easy	Very Easy

4. What do you LIKE most about what you just did?

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5. What do you DISLIKE most about what you just did?

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Tell us when you are ready to begin the next scenario ...

**Task 5: View new items**

You'd like to view new research items that have been added to the website.

1. Do you understand the task?                      No                      Yes
2. Is it a task you do at work?                      No                      Yes
3. How important is this task?                      Low    Med    High    Other: \_\_\_\_\_
4. How frequently do you do this task?            Never    Seldom    Often    Other: \_\_\_\_\_
5. Tell us when you are ready to begin.
6. Complete this task as quickly and accurately as you can.
7. Tell us when you have completed the task.

**Task 5: View new items**

Based on your experience doing this task:

1. How confident are you that you successfully completed the task?

- |                  |             |                      |         |                    |           |                |
|------------------|-------------|----------------------|---------|--------------------|-----------|----------------|
| 1                | 2           | 3                    | 4       | 5                  | 6         | 7              |
| Very Unconfident | Unconfident | Somewhat Unconfident | Neutral | Somewhat Confident | Confident | Very Confident |

2. How satisfied are you with your experience in using this website to complete this task?

- |                   |              |                       |         |                    |           |                |
|-------------------|--------------|-----------------------|---------|--------------------|-----------|----------------|
| 1                 | 2            | 3                     | 4       | 5                  | 6         | 7              |
| Very Dissatisfied | Dissatisfied | Somewhat Dissatisfied | Neutral | Somewhat Satisfied | Satisfied | Very Satisfied |

3. Compared to the way you do this task now, this tool is ...?

- |                |           |                    |         |               |      |           |
|----------------|-----------|--------------------|---------|---------------|------|-----------|
| 1              | 2         | 3                  | 4       | 5             | 6    | 7         |
| Very Difficult | Difficult | Somewhat Difficult | Neutral | Somewhat Easy | Easy | Very Easy |

4. What do you LIKE most about what you just did?

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5. What do you DISLIKE most about what you just did?

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**Tell us when you are ready to begin the next scenario ...**

### Task 6: Locate a Click 'n Play

You'd like to refresh yourself on using Money Guide Broker, locate the click 'n play library and view the Getting to Know: Money Guide Broker Click 'n Play.

1. Do you understand the task?                      No                      Yes
2. Is it a task you do at work?                      No                      Yes
3. How important is this task?                      Low    Med    High    Other: \_\_\_\_\_
4. How frequently do you do this task?            Never    Seldom    Often    Other: \_\_\_\_\_
5. Tell us when you are ready to begin.
6. Complete this task as quickly and accurately as you can.
7. Tell us when you have completed the task.

### Task 6: Locate a Click 'n Play

Based on your experience doing this task:

1. How confident are you that you successfully completed the task?

1	2	3	4	5	6	7
Very Unconfident	Unconfident	Somewhat Unconfident	Neutral	Somewhat Confident	Confident	Very Confident

2. How satisfied are you with your experience in using this website to complete this task?

1	2	3	4	5	6	7
Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Satisfied	Very Satisfied

3. Compared to the way you do this task now, this tool is ...?

1	2	3	4	5	6	7
Very Difficult	Difficult	Somewhat Difficult	Neutral	Somewhat Easy	Easy	Very Easy

4. What do you LIKE most about what you just did?

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5. What do you DISLIKE most about what you just did?

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**Tell us when you are ready to begin the next scenario ...**

## Task 7: View the Advisory Quarterly Reporting

You'd like to view the Advisory Quarterly Reporting.

1. Do you understand the task?                      No                      Yes
2. Is it a task you do at work?                      No                      Yes
3. How important is this task?                      Low    Med    High    Other: \_\_\_\_\_
4. How frequently do you do this task?            Never    Seldom    Often    Other: \_\_\_\_\_
5. Tell us when you are ready to begin.
6. Complete this task as quickly and accurately as you can.
7. Tell us when you have completed the task.

## Task 7: View the Advisory Quarterly Reporting

Based on your experience doing this task:

1. How confident are you that you successfully completed the task?

1	2	3	4	5	6	7
Very Unconfident	Unconfident	Somewhat Unconfident	Neutral	Somewhat Confident	Confident	Very Confident

2. How satisfied are you with your experience in using this website to complete this task?

1	2	3	4	5	6	7
Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Satisfied	Very Satisfied

3. Compared to the way you do this task now, this tool is ...?

1	2	3	4	5	6	7
Very Difficult	Difficult	Somewhat Difficult	Neutral	Somewhat Easy	Easy	Very Easy

4. What do you LIKE most about what you just did?

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5. What do you DISLIKE most about what you just did?

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Tell us when you are ready to begin the next scenario ...

### Task 8: Go to ING SmartWorks

You're all done working with the Broker-Dealer Center and would now like to go to ING SmartWorks.

1. Do you understand the task?                      No                      Yes
2. Is it a task you do at work?                      No                      Yes
3. How important is this task?                      Low    Med    High    Other: \_\_\_\_\_
4. How frequently do you do this task?            Never    Seldom    Often    Other: \_\_\_\_\_
5. Tell us when you are ready to begin.
6. Complete this task as quickly and accurately as you can.
7. Tell us when you have completed the task.

**Task 8: Go to ING SmartWorks**

Based on your experience doing this task:

1. How confident are you that you successfully completed the task?

1	2	3	4	5	6	7
Very Unconfident	Unconfident	Somewhat Unconfident	Neutral	Somewhat Confident	Confident	Very Confident

2. How satisfied are you with your experience in using this website to complete this task?

1	2	3	4	5	6	7
Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Satisfied	Very Satisfied

3. Compared to the way you do this task now, this tool is ...?

1	2	3	4	5	6	7
Very Difficult	Difficult	Somewhat Difficult	Neutral	Somewhat Easy	Easy	Very Easy

4. What do you LIKE most about what you just did?

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5. What do you DISLIKE most about what you just did?

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**Tell us when you are ready to begin the next scenario ...**

## Post-Test Questionnaire

1. Did you have enough time to evaluate and make comments on the site you evaluated?

No Yes N/A

2. How difficult was it to learn the user interface for the site?

1 2 3 4 5 N/A  
 Very Difficult Difficult Neutral Easy Very Easy

3. How much training is needed?

1 2 3 4 N/A  
 No Training Low Training Medium Training High Training

4. How satisfied were you with the appearance of the user interface?

1 2 3 4 5 N/A  
 Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

5. How satisfied were you with the terminology and labels?

1 2 3 4 5 N/A  
 Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

6. How satisfied were you with the consistency and integration of the site?

1 2 3 4 5 N/A  
 Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

7. How satisfied were you with the overall value provided by the site?

1 2 3 4 5 N/A  
 Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

8. Considering all factors (e.g., ease of learning, ease of use, ease of moving between screens, ease of locating information), what is your overall satisfaction with the site?

1 2 3 4 5 N/A  
 Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

9. Compared to your current way of doing your job, how easy or difficult was it for this site to handle these tasks?

1 2 3 4 5 N/A  
 Very Difficult Difficult Neutral Easy Very Easy

10. What did you LIKE most about the site you saw today?

11. What did you DISLIKE most about the site you saw today?

12. What additional training or information could we have provided you before starting the evaluation that would have helped you understand how this site functions?

13. What would you change about the testing procedure?

**Debriefing**

The End