**Pre-Test Prep work**

**Tease out participants from Sr. Sales Reps
Date:** Early September

Find out from Ezra, Jimmy, Steve, and Will if there are any west coast clients who would like to participate. Are there any special clients out there are known to place at least some orders online?

**Build a prototype for testing purposes**
**Date:** Complete by September 13th (Friday)
Create a click through prototype based on visual designs using Adobe Fireworks. *Will this prevent you from completing any key design tasks that programmers will be waiting on? Probably not, but we have to ask. As you say, this could be valuable for other purposes, such as demo’ing functionality to CE. I would mention that -*-------------------------------------------------------------------------------------------------------------------------------------

**Timeline and list of activities for testing**

**Purpose of test**
To objectively evaluate the new design and multiple levels of new functionality being offered. We're offering Laddawn customers new ways to work and we want to make sure they can quickly and easily complete the tasks they need to get their job done.

**For each test, a moderator and note taker are necessary. Susan and Steve will take turns playing these roles.**

**Test Tool(s):** Use Silverback to record screen movement and participant's face/voice during sessions.
<http://silverbackapp.com/>

**3 Day User Testing Strategy**

4-5 sessions/participants a day with the chance to review findings at the end of each day with a total of 12-15 tests for the 3 days.

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**Session outline and timing (35-45 minutes) per participant**
1. Pre-test prep work 1A+1B (5-10 minutes)
2. Conduct study 2A+2B (20-25 minutes)
3. Post session debrief (5-10 minutes)

**1A. Pre-test prep work A (3-5 minutes)**
a. Greet the participant and introduce them to the project.
b. Review and sign non-disclosures and recording permissions.
c. Talk with participant about why they're at the PackExpo and what they do.

**1B. Pre-test prep work B: Discuss specifics before starting study (3-5 minutes)**
a. Participant’s experience with usability studies and focus groups.
b. Importance of their involvement in the study. Thank them.
c. Moderator/note taker's role.
d. Room configuration, recording systems, observers, etc.
e. Thinking aloud reminder.

**2A. 1st impressions**(5 minutes) - Click around the prototype and let us know what their 1st impressions are and what they expect it to do.

**2B. Complete tasks**(15-20 minutes) - Participants will start at the widget and work their way through a complete workflow.

a. **Widget – looking for any item, whether stock or MOD**

Ask the tester if he has ordered or quoted anything recently, or plans to do so in the near future. Ask how they would go about finding that item.

*If we give them a stock item right out of the gate (below) I wonder if we are missing the opportunity to see how they react to search tools that no longer make a distinction between stock and MOD. Instead, as a first test task we could ask if they’ve ordered or quoted anything recently, or planned to in the very near future, and then have them look for that item.( For the sake of uniformity, we probably should follow that up with a standard search that every subject must carry out (such as the one you provided, was step a, now step b). We can skip my added step if the test subject can’t easily recall anything to search for.*

b. **Widget/Results, Scenario Date September 22** -Your client, Great Western Packaging (Reno NV, zip code 89501), is interested in a 12" x 24" 2mil layflat bag.

He is trying to find the best price and is looking for options. Research possibilities you could share with him. Observe how the participant moves through the widget to make the selections. Once they get a result, do they notice/comprehend the various features of the search result – availability, product details, save, share, price breaks, etc.? Observe how the participant reacts to exact stock match v. MOD alternatives; do they grasp the differences?

c. **Sharing, Scenario Date September 22** - You find this great MOD or stock (does it matter?) item you want to share with Great Western client, James Donovan.. *These might be leading questions, since neither sharing nor marking up are things they can currently do online. I might just leave it at share, and then see what the test participant does and find out if they discover the markup tool.* *Also, does it need to be a MOD?. You might ask them to do this with the result obtained at step b*. Observe whether the tester finds the share link, and once there, whether he/she grasps the internal v. external sharing, and the ability to mark up prices. *Q: Will your scenario lead to actually sharing; if so, it will need to include save and tagging!*

c. **Saved Item/Cart, Scenario Date September 26** - James Donovan would like you to purchase this item after it has been shared.

d. **Review Order/Order History, Scenario Date September 27** - Mr. Donovan would like you to check on the shipping status of the MOD item you have purchased.

**3.Post Session Debrief** (5-10 minutes)

a. Ask broad questions to collect preference and other qualitative data.
b. Follow up on any particular problems that came up for the participant.