Usability Research

Strategic goals for customer visits

Mohammed, Zulfikar

[Date]

[Course title]

Table of Contents

Details of Visit

Visiting: X (Support Services and Construction)

Location: X, West Bromwich, West Midlands, B70 6RP **Contact:** X and X

LANDESK Attendees: Zulfikar Mohammed (UXD); X (Service Account Manager)

Application: Web Access (Web Desk), Self Service

Current Build/Version: Service Desk 7.

Purpose of visit: Customer visit, understand our user's needs/goals

Date of visit: 6th August 2014

Time: 10am – 3pm

Document Version: 1.0

Document creation date: 30th July 2014

Document author: Zulfikar Mohammed

Background/Overview

History

The purpose of this document is to outline the strategic goals and actionable processes to test the usability of the LANDESK Service Desk application and interactive experience.

Originally founded in 1985 as LAN Systems, the company's software product assets were acquired by Intel in 1991, forming Intel's LANDESK division.

LANDESK introduced the desktop management category in 1993.

In 2006 LANDESK added process management technologies to its product line and extended into the consolidated service desk market with LANDESK Service Desk.

In August 2008 Touchpaper was acquired, an IT Service Management vendor to merge within LANDESK division. This is where LANDESK branding started in Service Desk 7.2.6

Quarterly releases started in Service Desk 7.6.1 in June 2013, prior to that releases where done on a yearly ad hoc basis.

LANDESK software is used to manage over 250 million desktops, servers and mobile devices.

LANDESK sells directly and also through partners worldwide. It has regional offices and development centres across the world (18 countries).

LANDESK products covers asset inventory/discovery, security vulnerability detection and remediation, software distribution, IT compliance reporting, patch management, software license management, security policy enforcement, and endpoint device power consumption management.

UX Process

LANDESK has always adopted a UX Design Process for all their products however gathering analytics over the course of the last 2 years, several components of the application have been identified as areas where additional interface refinements would result in an improved user experience.

In order to determine the most effective ways in which the Service Desk experience can increase Productivity, Communication, Consistency and Standards, Flexibility, Efficiency and User Interactivity, a usability test will be implemented among a select sample of participants (Service Desk Users and Self Service Users) to gather insights and data around several perceived pressure points. These include but are not inherently limited to:

Incident Management, Problem Management, Change Management, Configuration Management, Release Management, Service Level Management, Capacity Management, Availability Management, Security Management and Request Management.

At the end of the usability test the key learnings and observations will be compiled and re-viewed into an actionable report that will provide recommendations and next steps for how to best improve the application experience and what to consider when planning the next generation application.

New design ideas and concept innovations will be discussed with users to determine if the direction of the application and redesign is heading is the right direction.

Every innovation offers a path forward, whether or not these concepts become the future goal of our application, you can be sure of one thing, the UX team will never stop refining the User Experience.

The users will have a chance to see how LANDESK UX are committed to research and development which will have informed the production applications of today, from early incarnations of our past.

The journey truly begins with user feedback!

What do you get from this research?

The most important aspect of this technique is that it gives you the most realistic data regarding the users, their behaviour, and the environment within which they conduct their tasks.

As users are conducting their own tasks, this approach presents a set of conditions that will yield more natural user behaviour than a user conducting tasks within a lab environment.

Setting clear objectives

As with all research, it is critical that we set clear objectives with our client at the very beginning of the process. These objectives determine the most appropriate research method to use. The UXD will be conducting the inquiries as the users fulfil their work objectives.

Preparing the research

The session's structure will be:

1. Observational:
    - Need to act as an apprentice observing the instructor (Support Desk Analysts) walks through an activity, interrupting with questions only occasionally. The activity of interest should be one that the instructor has said they perform regularly in conducting their daily tasks.

2. Interview:
    - The main focus of the interview is to understand more about why and how you use the LANDESK software in serving the end users. Treating the approach more like a usability test, where an allocated time slot with people who are willing to be interviewed. (Being flexible and adapt to different circumstances as they unfold.)

Conducting the research

Record the sessions with the user, as you have no idea what you will learn and also no idea of the potential importance of what you are being told.

Users may tell you what they think you want to hear. It can take a while for users to relax and to get on with what they actually do.

Reporting the findings

One of the most time-consuming aspects is sifting through all the data looking for interesting behaviour and then noting repeat instances of that same or similar behaviour.

It is good to talk through the observations with someone who is likely to have a better understanding of the system or context than the User Experience Designer.

Photos help understand the environments within which our products is being used.

Agenda

On Day of Research Inquiry

Follow general best practices during the interview:

- Interview where the interaction happens
- Avoid a fixed set of questions
- Focus on goals first, tasks second
- Avoid making the user a designer
- Avoid discussions of technology
- Encourage storytelling
- Ask for a show and tell
- Avoid leading questions

During Research Inquiry

- Greet the users
- Introduce them to any other observers or note takers.
- Explain research procedure and that you are trying to understand how they do their work in their environment
- Try to relax the user by telling them the following:
  "*The main focus of our interview today is to understand more about why and how you use LANDESK software in servicing your end-user and incident management.*

  We consider you the expert at your work so there are no wrong answers to any of our questions. While you answer questions or guide us through tasks, please focus on the details of how you actually do your work.

  It may help to think about the last time you performed the task and explain it to us as if we are going to need to perform the task just as you did.

  Please feel free to be honest and critical even if the way your work actually gets done is not the way it should be done - we are testing the systems you use, not you, and everything you tell us is strictly confidential."
- Ask them if they have any questions, before you begin?
- Ask an ice breaker question about some of the demographic information you want to collect anyway. (Put user at ease if possible)
- Ask interview type questions first
- Switch to observation, focusing on having users "show" you how they do a task instead of just telling you.

When done,

- Let them know how they can find out about the user research results (send them an email)
- Thank them for participating.
- Ask them if they know anyone else who may be interested in participating

After Research Inquiry

- The UXD should debrief/review the interview
- Write "Thank You" email to user(s) for their participation
- Analyse the notes as soon as possible
- Write up notes - full sentences and as much details as possible so it can be understood by others outside of the interview
- Store notes in a safe location where user's privacy can be maintained
- Create high level summary of user notes and make available to greater team or community - make sure to conceal interviewee information

Note-taking - Guidelines:

- Capture every word the user says!
- Take notes directly on a laptop
- Taking notes by hand (can be useful in creating diagrams)
- Make an audio recording (need to transcribe the recordings later, may take a significant amount of time).
- Abbreviations are helpful, paraphrasing is OK
- Try and record especially poignant quotes directly and mark them as quotes
- Raw notes do not need to be perfect
- Clean up notes during debrief soon after the interview
- Ask to repeat something or ask for clarification (without interrupting the user too much), in between questions are a good time
- If UXD comes up with new questions, record them in the notes

Research Inquiry Guide

A Research Inquiry Guide can help the interviewer stay focused and on track during the inquiry. It contains general questions and areas of interest to keep in mind during the user meeting.

Some questions may be asked directly, but many others will just represent general lines of inquiry the interviewer wants to explore. Additionally, the interviewer should be open to following other paths as dictated by the work performed by the interviewee. Although the meeting begins with a short traditional interview portion, once you transition into inquiry mode, think of this as a partnership formed between the interviewer and interviewee in order to create a dialog. The goal is for the interviewer to interfere with the interviewee's work as little as possible, blend into the surroundings, and ask questions when necessary to understand not only the user's opinions and experiences, but also their motivations and context.

The goal is to gain a general understanding of the kind of activities the user does to get their work done. It's important to note the user's primary (most critical, most often, etc.) activities. Ask them to show you how they complete these activities during the transition portion of the inquiry.

Observation mode

When the UXD has enough background and general information shift from traditional interview mode to research inquiry mode. Ask the user to perform some of the tasks. Let the user know you may interrupt with questions but mostly you'll be observing at this point.

Test Objectives

- To understand how the application load time impacts a user's decision.
- To understand how Incidents and Requests are handled by the Analyst.
- To determine how phone calls are handled and overall application experience.
- To determine if the interface and functionality/feature placement provide an understanding of the purpose of the application.
- To determine if a user can successfully navigate between screens/panes.
- To determine how many calls an Analyst would takes and does the application react quick enough.
- To determine if the Analyst uses any aids to complete their tasks which are not part of the application (pen and paper).
- To understand when users feel 'lost' in the system and the actions they take to reconnect.
- To determine whether a user prefers a more guided or free-form experience.
- To determine if any of the various application controls are problematic for user interaction.
- To determine whether users can understand all functionality and features of the application.
- To determine if the icons used are simple enough to understand.
- To understand the interaction between the user and the application is a pleasant user experience.
- To determine whether the user feels the user experience can be enhanced.
- To understand the pain points or limitations of the application based on the users roles and responsibilities.
- To determine the effectiveness of the information given by the application to help solve/log issues.
- To understand the new design ideas and if these would enable the user to work effectively.

Field Research Overview

- Current Team structure
- 1st,2nd and 3rd line support
- Length of usage of LANDESK product
- Previous software used
- Types of users and common issues
- Number of users (service desk analyst) interviewed
- Observations when using service desk
- Interviews when using service desk
- Issues and concerns raised from the interviews
- Summary of product
- Possible areas to look into for future development
- How the day go, did you achieve what you expected?
- How many users did you speak to?
- Reactions to the:
    - Functions
    - Features
    - Navigation
    - Visual designs
        - Concept designs
        - Charts
        - Service Catalogue
        - Forms
        - Data Visualisation
- Questions and comments
- Summary of visit
- Actions to take away
- Follow up

Interview Questions

Demographics and Characteristics:

1. What is your name?
2. How long have you worked for?
3. What is your current job title?
4. How long have you been in this role?
5. Do you live local? (ice breaker)
6. How do you get to work? (ice breaker)
7. How big is your user group? What demographic location do you cover?
8. How many Support Analyst do you have in the team?
9. When is the busiest time for you?

Job related questions:

1. [**Activities**] - How would you describe your job, and what you do?
2. [**Activities**] - Tell me about a typical day (include activities around your work)?
3. [**Interactions**] - Can you tell me about your users and the service you provide?
4. [**Opportunity**] - What activities currently waste your time?
5. [**Goals**] - What makes a good day? A bad day?
6. [**Preference**] - If you could change anything about your job as a Support Analyst, what would it be?
7. [**Priorities**] - What is most important to you?
8. [**Information**] - What helps you make decisions?

Software related - General:

1. [**Mental Model**] - What do you think about work, resources, services and systems?
2. [**Activities**] - What kinds of activities do you perform? Do they occur regularly or occasionally?
3. [**Preference**] - Which LANDESK software do you use?
4. [**Frequency**] - How long have you used the LANDESK software?
5. [**Mental Model**] - What is your overall impression of the LANDESK software you use?
6. [**Function**] - What are the most common things you do with the product?
7. [**Frequency**] - What parts of the product do you use most?
8. [**Preference**] - What are your favourite aspects of the product? What drives you crazy?
9. [**Failure**] - How do you work around problems?
10. [**Motivation**] - What are your goals? What do you enjoy doing?
11. [**Opportunities**] - What is your pain points? What do you avoid?
12. [**Interactions**] – Who or what do you consult or work with?
13. [**Expertise**] - What shortcuts do you use?
14. [**Process**] – How do you make decisions and perform tasks?
15. [**Preference**] - What goals do you have and which product helps you work towards that goal?

16. [**Interactions**] – What basic tasks does the product support in order to help you accomplish these goals?
17. [**Failure**] - What frustrations do users have in general?
18. [**Failure**] - What frustrations do they have with Self Service product?
19. [**Process**] – Have you had a good user experience using our software?
20. [**Rating**] – What score out of 10 would you give it (10 being excellent)?
21. [**Expertise**] – How would you improve the user journey, how would you describe it?
22. [**Preference**] – If you had to describe this software in a few words as possible, what would they be, and why?

Software related - Navigation:

1. How well does the navigation work?
2. Is the menu easy to navigate around?
3. Have you always found the pages through the menu?
4. Is the menu grouped in a well-structured way?
5. How could the menu be better?
6. How would you rate the navigation and user journey using the navigation out of 10?
7. Why have you given that score?
8. Do you feel you have had a good user journey through the navigation?
9. How can we make it better?

Software related - Design/layout:

1. What do you think of the design of the page?
2. Does anything look out of place?
3. What would you do to improve the design/layout?
4. Is the design/layout easy to use?
5. What improvements if any could be made to the design?
6. Have you seen a design/layout that has impressed you?
7. What would you do to make this design/layout perfect?
8. Do you know about responsive websites?

Software related - Dashboard:

1. What do you think of the dashboard?
2. Does the dashboard cater for your needs?
3. Can you create your own widgets on the dashboard?
4. Is the dashboard easy to customise?
5. What improvements if any could be made to the dashboard?
6. Would defined height and width make for a better design?
7. Have you seen a dashboard that has impressed you?

Software related - Activities:

1. Are you involved with resolving issues? If so, can you tell me what that process is like?
2. How busy do you get? How long does it typically take to resolve an issue?
3. How is the team/site organised?
4. Have you been involved in the set-up of the software?
5. Where you involved in tweaking the modelling of the software?
6. What kinds of activities do you do in your job that our software helps with?
7. What could the software do to help you do your job better?
8. As a percentage how much do you think you utilise our software?
9. Do you have a way to work around certain problems/issues you have found with our software?
10. How helpful has the documentation/support been to you as a user?
11. How would you describe the LANDESK software to someone who has never used it?
12. What do you like/not like about the LANDESK software in general?

Observational Questions

Areas to focus on during observation

General:

- **Sequences**:
  - In what order is the user performing tasks?
  - Are there interruptions?
  - Are they doing more than one thing at a time?
  - Want to be able to create rich workflow models (exactly how the user completes certain tasks) from this kind of data.
- **Tools**:
  - What is the user using to perform their work?
  - What tool is it and what level of knowledge does the user have?
- **Problems**:
  - What is frustrating or unexpected for the user?
- **Mental models**:
  - How does the user think about their work?
  - What expectations do they have?
  - How knowledgeable is the user when taking calls?
- **Interactions**:
  - Do they consult different people?
  - Do they consult reference materials?
  - Do they consult processes?
  - If so, what for?

Details:

- **Environment and facilities**:
  - Is it busy?
  - What sort of computers do users have?
  - What level of Internet access?
  - Do they use headsets or standard telephones?
  - Do they have printers, fax machines and photocopiers?
  - Do they have to share these?
  - Do they have to walk to these machines?
  - Sketch a rough map of the work area, so that you don't have to try to remember these details later.
- **Interruptions**:
  - Can users concentrate on their work, or are the frequently interrupted by other applications, people or events?
  - What is the impact of these interruptions on their workflow?
  - Do current systems (Inc. LANDESK) support these interruptions?
- **Applications**:
  - What applications, systems and websites are currently being used?
  - Exactly which screens and fields are used, and in what sequence?
  - Get screen dumps if possible.
- **Issues**:
  - What problems do users currently have?
  - Be interested not only in application or system issues, but also workplace issues (possible to address them in our design).

- **Artefacts**:
    - Do users have ‘cheat sheets’ and notes on their computers?
    - Do they have tables or charts or phone lists that they rely on?
    - Possible to include some of this information within the application. (Get copies of any artefact’s, if possible)
- **Double-handling**:
    - Are they entering account numbers in two different systems?
    - Are the users duplicating their efforts to retrieve different data?
- **Workarounds**:
    - Are users compensating for poor product design or poor work design by applying workarounds?
    - Will these have an impact on our design or can we accommodate or eliminate them?
- **Triggers**:
    - What is the event that triggers users to take a particular course of action or begin a particular task?
    - Triggers are often events like phone calls, arrival of emails for faxes, or work queues.
- **Hand-over points**:
    - When do people receive or hand over tasks?
- **Variations**:
    - Remember to ask users about whether the work you see is typical and, if not, why not?
    - Ask about what it’s like when things get particularly busy (or particularly quiet).

Interrupting the user during observation

The UXD should interrupt the user only in the following circumstances:

- The user is doing a lot of work without speaking about it – Ask the user questions about what they are doing and remind them to give a running description of what they are doing so the UXD may be able to re-create their work.
- The user is giving very general or broad details about an important task or action. Ask the user questions about what they are doing and remind them that you are looking for details of their work so that you can re-create it. Remind them that they can recount the details of the last time they went through this activity to make it more concrete.
- It is unclear what the user is talking about. The user may use jargon that the UXD is unfamiliar with. As an apprentice, it is important to know what you are dealing with and it is all right to interrupt the user to ask a clarifying question when you do not know what they are talking about.

Types of incidents:

- What is the majority of your incidents related to?
    - Can you show some examples?
- Have you created been involved with any knowledge library material?
    - Can you show some examples?

Follow-up Questions

- Are there gaps in the process the user has described?
    - Now is the time to investigate and make sure all the steps involved in completing the activity are recorded.
    - UXD may end up delving back into observation mode as the user remembers something they forgot to mention and begins another description of tasks and actions.
- Are there other parts of the process that are unclear?
    - Now is the time to clarify.
- Are there instances where the user or note-taker had a question, but did not ask because it would have adversely interrupted the instructor?
    - Now is the time to ask these questions.

Post-interview Debrief

- Arrange a debriefing session as soon as possible after the interview
- Discuss and record initial general impressions from the interview
- Go through the notes removing any personally identifiable information (names, non-work related places, etc.)
- Names/places should be substituted with anonymous titles:
- Tim Jones helped me ... should be --> [a Support Desk Analyst] helped me ...
- Go through the notes add text to make the notes understandable by those outside of the interview
- Complete fragmented sentences or thoughts
- Expand abbreviations

Demographics and Characteristics

User Profiles

Systems Administrator

Support Desk Analyst

Support Desk Team Lead

Support Desk Manager/Director

End User - Technical

End User - Non Technical

Personas

1. Finding the Users
    - Who are the Users
    - How many Users are there
    - What do they do with the system
2. Building a Hypothesis
    - What are the differences among the users
        - Analysing the material
        - Grouping the users
        - Identifying and naming the groups
3. Verification
    - Data for Personas
        - Likes/dislikes
        - Inner needs
        - Values
    - Data for situation
        - Area of work
        - Work conditions
    - Data for scenarios
        - Work strategies and goals
        - Information strategies and goals
4. Finding Patterns
    - Does the initial grouping hold
    - Are there other groups to consider
    - Are all equally important
5. Constructing Personas
    - Body
        - Name
        - Age
        - Picture
    - Psyche
        - Extrovert/introvert

    - Background
        - Occupation
    - Emotions and attitude
        - Towards the technology
        - Towards the company
        - The information
    - Personal traits
6. Defining Situations
    - What are the needs of this persona
    - What are the situations
7. Validation and Buy-in
    - Do you know someone like this
8. Dissemination of Knowledge
    - How can we share the personas with the organisation
9. Creating Scenarios
    - What happens when the persona uses the technology
10. On-going Development
    - Does the new information alter the persona

Participants in Usability

Participant 1:

-
-
-
-
-
-
-
-
-

Participant 2:

-
-
-
-
-
-
-
-
-
-

Participant 3:

-
-
-
-
-
-
-
-
-
-

User Matrices

Start thinking about the diversity of users to include in the user research.

Users (sighted, partially sighted, etc)

Desktop screens (1, 2, 3, etc)

Application use (New, veteran, novice, advanced, etc)

Team structure (simple, large, cross-site, cross-demographics, male-to-female, etc)

Group size (small, medium, large)

Technical level (beginner, intermediate, advanced)

Region (London, etc)