Ethnographic Research: Home Gallery and Encircle Apps

Moderator's Guide

In-Home Usability Sessions in the Boston area: October 13-15

Location: Boston area

Prepared by:

Robert L. (Bob) Thomas Director of User Research

Usability Test Goals and Methodology

| Goals | Methods |
|--|---|
| Can users find the apps in the App Store? | Task Scenario: You want to find and install an application that will allow you to create and store a list of your personal possessions. Please show me how you would proceed using this iPad. |
| What are the major usability problems that Home Gallery may have? That Encircle may have? Competitive analysis: Encircle. From a pure feature/functionality aspect, Home Gallery works. But it has usability issues | Task Scenario: You now have the application on your iPad. Go ahead and start the application. Assume you would like to record some of the personal possessions in your house. Please walk me through what you would do. (3-6 items) Counter balance the 2 apps |
| | Search, download, and install the app Walk-about a room and record 2-4 personal possessions (listen but don't interrupt) Retrospective review: Tutorial screen (Home Gallery only) Registration/sign-up screen Property screen Adding items to rooms (selecting room, capturing/photographing an item, entering item details) Cloud Synch (Home Gallery only) Saving and exporting the items recorded |
| Want to look at (1) "Barriers to Use" vs. (2) "Usability Issues" Comparison in ease of use of Home Gallery vs. Encircle. These are the key 5-7 differentiating factors/ usability issues. How big of an impact are these issues to preventing adoption and use? | POST-TASK FOR EACH APP Post-task interview (and also in pre-task questions) Post-task interview and post-task comparison |

USABILITY TEST DATES: October 13-15

PARTICIPANTS: 8

SCHEDULE: below; 2-3 sessions per day, with at least 60-minute breaks in

between

DESIGN: A total of 8, two-hour, one-on-one research sessions

INCENTIVES: \$250 in compensation

Testing Schedule (8 slots)

| Date | Participant | Time |
|---|-------------|---|
| Tuesday, 10/13 Schedule 2 participants on the South Shore | | Please ensure that the UX team has enough time (at least one hour) between sessions to travel to the next home/condo/apartment. |
| | 1 | 10:00 a.m 12:00 p.m. (iPad) |
| | 2 | 12:30 p.m 2:30 p.m. (iPad) |
| | | |
| Wednesday, 10/14 | | Please ensure that the UX team has enough time (at least one hour) between sessions to travel to the next home/condo/apartment. |
| | 3 | 10:00 a.m 12:00 p.m. (iPhone) |
| | 4 | 1:30 p.m 3:30 p.m. (iPhone) |
| | 5 | 5:00 p.m 7:00 p.m. (iPhone) |
| | | |
| Thursday, 10/15 | | Please ensure that the UX team has enough time (at least one hour) between sessions to travel to the next home/condo/apartment. |
| | 6 | 10:00 a.m 12:00 p.m. (iPhone) |
| | 7 | 1:30 p.m 3:30 p.m. (iPhone) |
| | 8 | 5:00 p.m 7:00 p.m. (iPad) |

COUNTER-BALANCE SHEET

| | Device | First App | Second App | |
|----------------------|--------|--------------|--------------|--|
| Tuesday, October 13 | | | | |
| P1 | iPad | Home Gallery | Encircle | |
| P2 | iPad | Encircle | Home Gallery | |
| Wednesday October 14 | | | | |
| P3 | iPhone | Home Gallery | Encircle | |
| P4 | iPhone | Encircle | Home Gallery | |
| P5 | iPhone | Home Gallery | Encircle | |
| Thursday, October 15 | | | | |
| P6 | iPhone | Encircle | Home Gallery | |
| P7 | iPhone | Home Gallery | Encircle | |
| P8 | iPad | Encircle | Home Gallery | |

NOTE TO MODERATOR: Delete Home Gallery and Encircle after each session or before the next session begins

EQUIPMENT TO BRING:

- 2 usability testing laptops
- iPad
- iPhone
- iPevo camera or software to record the iPad and iPhone screens and broadcast to usability testing laptops
- MiFi
- video camera or a second iPhone to record video and audio
- microphone

Informed Consent, Introduction, & Pre-Test Questions

(5-10 Minutes)

Orient participant to restrooms and water fountains, offer snacks/drink.

Note: DON'T LET PARTICIPANTS KNOW WE'RE FROM OUR COMPANY

Have the participant read the consent agreement, ask any questions, and sign the form if they agree.

| Ha | ve the participant complete the questionnaire. |
|----------------------|--|
| • | Welcome & Introduce self |
| will use | the Internet to research insurance online. We want to evaluate how easy our products are to learn use. We're not trying to sell you anything. |
| Му | colleague is also here to take notes so we can improve our designs based on your feedback. |
| • | Most important to keep in mind, it is the software we are testing, not you |
| web of to to d | guide you through today's session, and interview you about your reactions to prototypes of a osite. Keep in mind, we're not evaluating you in any way, we're only interested in your evaluation the designs we show you. Throughout the session, I'll encourage you to freely express your opinions, comment on what is clear and what is unclear to you, and in particular, what you find confusing or ficult to understand. Don't worry about flattering or insulting me. Please just be as honest as sible. |
| • | We would like to understand how you would use an application that allows you to keep track of the different personal possessions you have in your home/condo/apartment. |
| • | The session will last about 2 hours. I will first ask you a few questions and ask you to do a short exercise. I will then have you use two iPad applications. I'd like to then discuss how well the application matched your expectations, and where it can be improved. |
| | Ask to think aloud |
| | Describe your steps, what you are looking for, etc |
| | Your comments are what is very important to us - we ask that you give open and honest opinion both good and bad |
| | My role: neutral observer taking notes |
| • | Describe parts of the session, how long it will last, can take breaks at any time |
| | The session will take about 90 minutes, so we'll be done at Is that OK? |

- We'll be recording the session
- Recordings are used for research purposes only & your name will not be associated with any data collected.
- The tasks
 - ☐ Try to complete as if you were doing this for real
 - Spend as little or as much time as you normally would doing similar tasks at home/work
 - ☐ Let me know when you have completed the task or gone as far as you can
 - It is ok if you cannot complete each task, and we may not get to every task
 - ☐ Repeat that it is the software we are testing, any difficulties are b/c it wasn't designed in a way that makes sense to you
- Any questions before we begin?

When you were contacted about this test session, we discussed a little bit about your background. Before we get started with our tasks today, I want to ask you a few more questions.

Pre-Task Questions

| 1.a. Have you ever had to file a property claim? |
|--|
| 1.b. If so, what was the process like? Describe it for me. |
| 1.c. If not, how would you expect the process to work? |
| |
| 2.a. If you filed a property claim, did you get any money back from losses of your personal possessions? |
| Are you confident or not confident that we were reimbursed for all your losses? How did you know you had included everything on their personal inventory list? |
| 2.b. If not, would you expect to get any money back? |
| 3.a. If you filed a property claim, how did you communicate your losses of your personal possessions? |
| 3.b. If not, how would you expect to communicate losses of your personal possessions? |
| [NOTE TO MODERATOR: Want to understand if the P had made an inventory list If so, why? If not, why not? Trying to find out barriers to use of an app or creating an inventory list.] |

Outline of Tasks: Home Gallery

Task 1: App Search and Download (5 Minutes)

• You want to find and install an application that will allow you to create and store a list of your personal possessions. Please show me how you would proceed using this iPad.

Task 2: Walk-About for 2-4 Personal Possessions (20 Minutes)

• You now have the application on your device. Go ahead and start the application. Assume you would like to track some of the personal possessions in your home/condo/apartment. Please walk me through what you would do.

Task 3: Application Retrospective: Tutorial Screen (5 Minutes)

• Did you notice anywhere in this app where you could get a walk-through of how the app worked? Were you confident that you knew how to use the app?

Task 4: Application Retrospective: Registration (5 Minutes)

• Let us start back at the beginning. You downloaded the application and were greeted with the tutorial and the option to register. Did you understand this screen?

Task 5: Application Retrospective: Property One Setup (5 Minutes)

• Did you notice anywhere in this app where you could enter information about your home, condo, or apartment?

Task 6: Application Retrospective: Adding Items (10 Minutes)

• During your walk-about, you went through the process of tracking some of your personal possessions. Walk me through the process again. Is this what you expected to do? How would you have wanted to "start" the process?

Task 7: Application Retrospective: Cloud Synch (5 Minutes)

• Did you notice the "Cloud Sync" option? What do you think it does? Would you or would you not use it?

Task 8: Application Retrospective: Export and Save (5 Minutes)

• Let us assume you have entered all your personal possessions into this application. Did you see anywhere you could send the personal possessions you tracked to yourself or someone else?

Task 1: App Search & Download (5 Minutes)

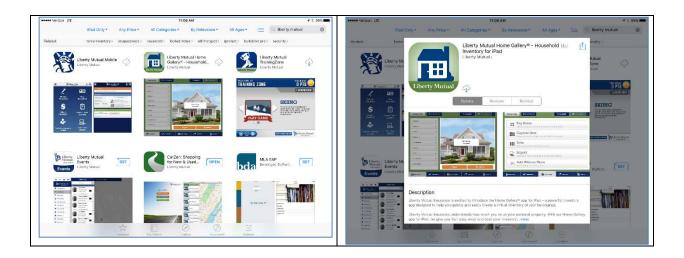
APP: Home Gallery

You want to find and install an application that will allow you to create and store a list of your personal possessions. Please show me how you would proceed using this iPad.

Task Questions

1. How would you find it? What would you expect this application to be called? [If they need help, go to App Store and search for "home gallery" to find Home Gallery.]

2. Please install the application on your iPad.



Task 2: Walk-About for 2-4 Personal Possessions (20 Minutes)

You now have the application on your device. Go ahead and start the application. Assume you would like to track some of the personal possessions in your house/condo/apartment. Please walk me through what you would do.

Task Questions

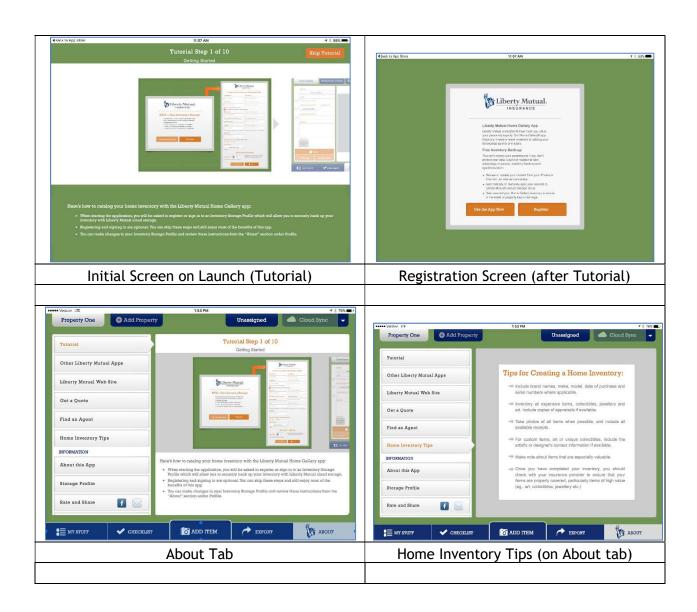
If you can speak out loud as you're completing this task, I will just listen, and not interrupt.

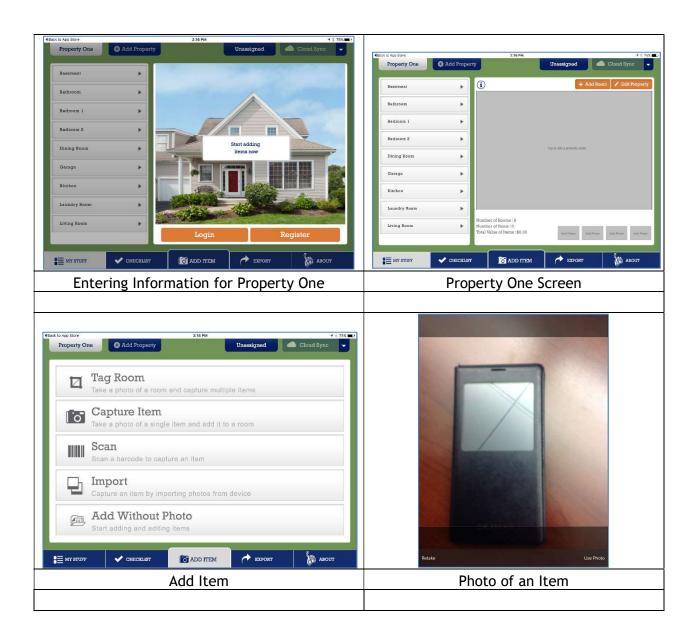
[Note down the following:

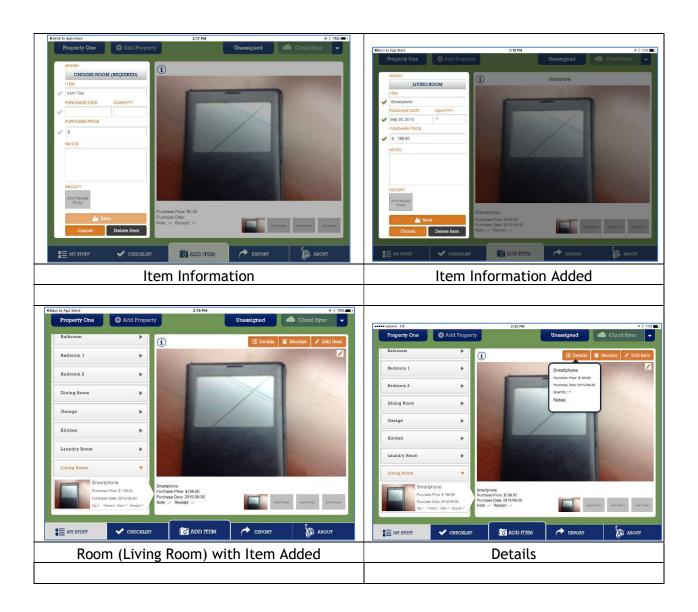
Where they want to start (by item, by room, by category)
Do they follow the tutorial? Are they able to understand it - does it help/hinder?

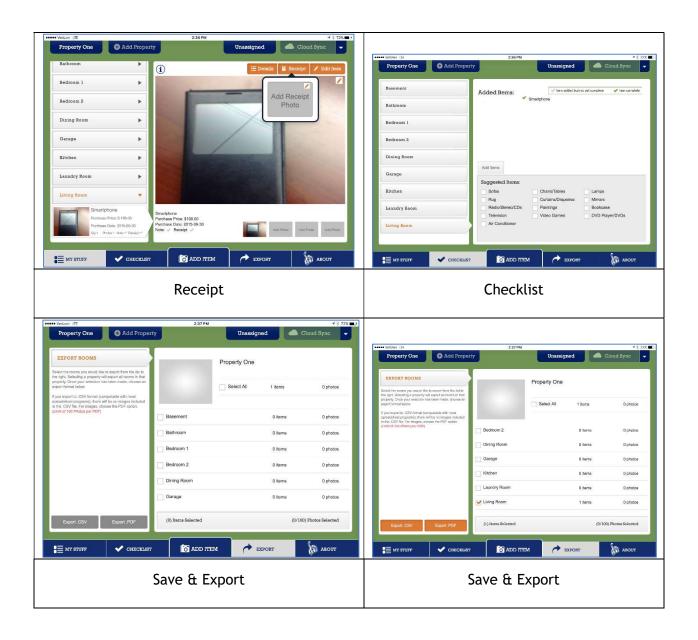
What causes confusion?]

[Allow participants to select 2-4 items of choice, and watch them walk through the process. After they have captured 2-4 items, end the task and return to a seated area.]





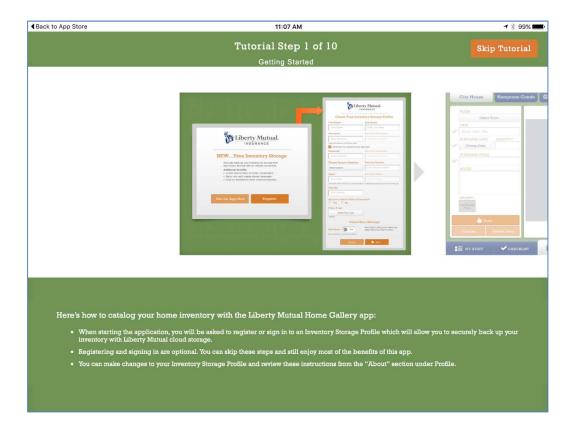


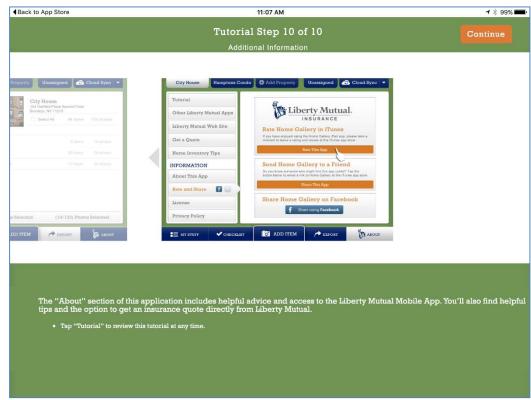


Task 3: Application Retrospective: Tutorial (5 Minutes)

Did you notice anywhere in this app where you could get a walk-through of how the app worked? Were you confident that you knew how to use the app?

| • | if they went through it] . Did this offer value? if yes |
|---|---|
| | . Do you go through tutorials typically? (if yes) When was the last time you went through a tutorial? |
| | . How could the tutorial be improved? |
| | . If you had to access it again, how would you go back to it? |
| | |
| • | if they closed it] . Why did you close the tutorial? |
| | . Do you go through tutorials typically? (if yes) When was the last time you went through a tutorial? |
| | . What could make the tutorial more valuable to you? |
| | . If you had to access it again, how would you go back to it? |
| | |





Task 4: Application Retrospective: Registration Screen (5 Minutes)

Let us start back at the beginning. You downloaded the application and were greeted with the Registration screen. Did you understand this screen? How would you describe it to someone else?

NOTE TO MODERATOR: If participant did not sign up (register), have them try it out and give feedback. If you did not choose to register initially when you opened the app, why not? Having used the app, would you register it? Do you see any value in registering it?

[if necessary] How would you expect this screen to work?

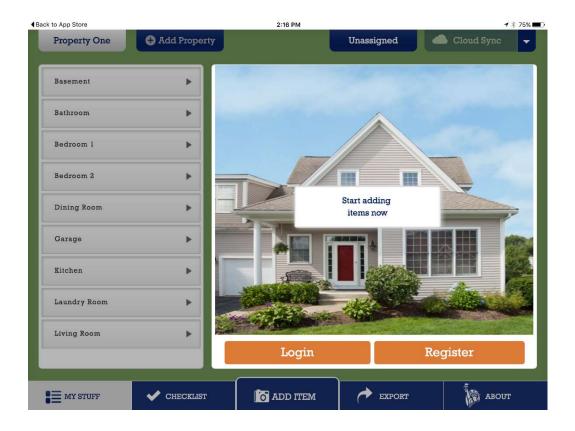
• [if necessary] What would make this screen easier to understand?

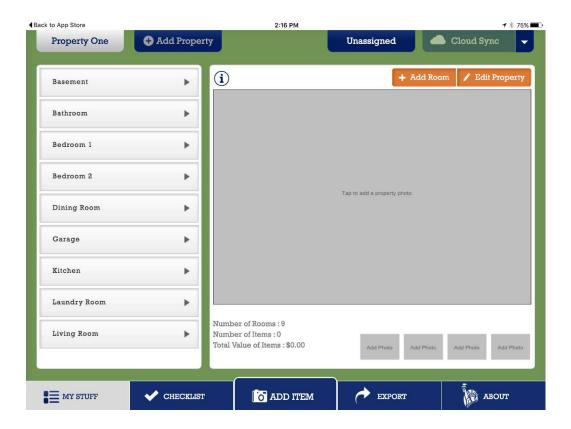


Task 5: Application Retrospective: Property One Setup (5 Minutes)

Did you notice anywhere in this app where you could enter information about your home, condo, or apartment?

- Is this what you expected to do after adding a property to the application? How would you have wanted to "start" the process?
- Was it clear to you where you were in this process?





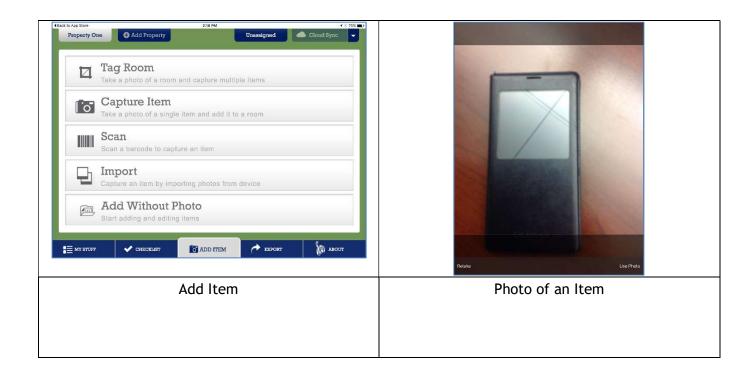
Task 6: Application Retrospective: Adding Items (10 Minutes)

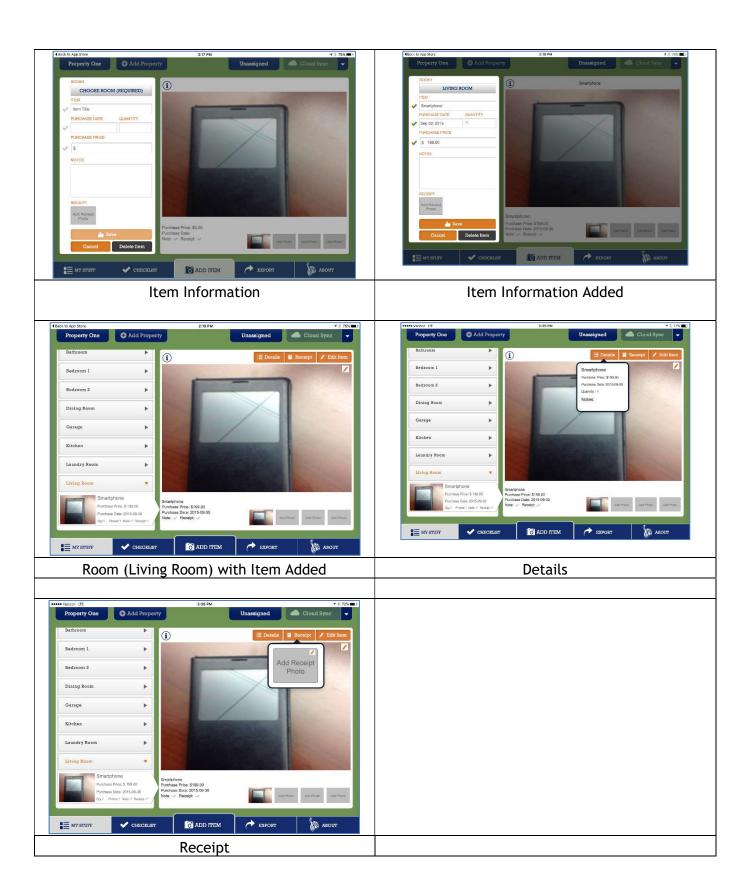
During your walk-about, you went through the process of tracking some of your personal possessions. Walk me through the process again. Is this what you expected to do? How would you have wanted to "start" the process?

| A c | dd Item Screen/Select Room Did you understand this screen? |
|------------|---|
| • | Is this what you expected to do after adding a property to the application? How would you have wanted to "start" the process? |
| • | [if necessary] How would you expect this screen to work? |
| • | [if necessary] What would make this screen easier to understand? |
| • | Was it clear to you where you were in this process? |
| • | How would you add, delete, edit, or re-order the rooms to suit your convenience? |
| • | If you had a room in your house that wasn't listed, what would you do? |

Photo Capture

- 1. Is this how you expected to begin entry of your personal possessions, by taking a photo? Comment on your preferred approach.
 - a. Do you feel you must take a photo to continue?
- 2. How many photos would you take of your personal possessions? How many would you expect the application allows per personal possession?



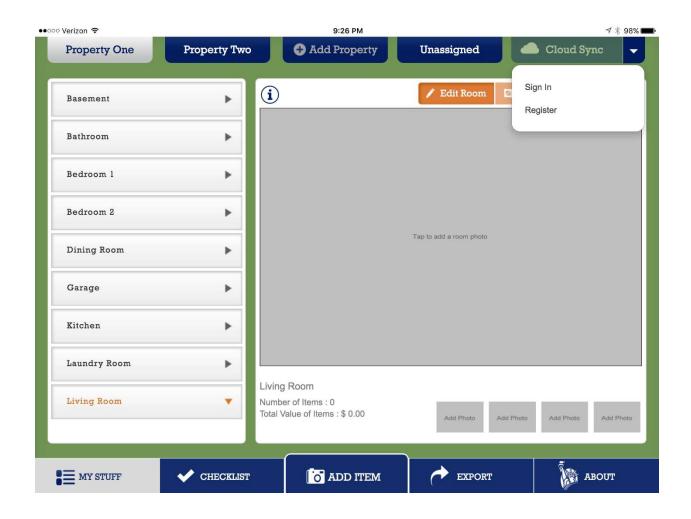


Task 7: Application Retrospective: Cloud Synch (5 Minutes)

Did you notice the "Cloud Sync" option? What do you think it does? Would you or would you not use it?

NOTE TO MODERATOR: Do participants think information is synched to our company's servers or to the Apple iCloud? ASK: Do you know what is meant by the "cloud"? "cloud synch"? Where do you think this information is located in the cloud?

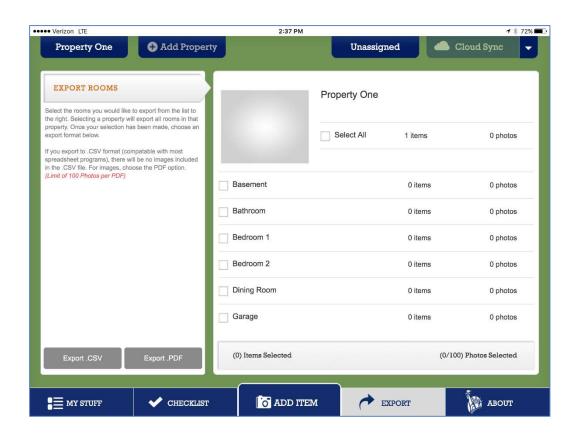
Are you or are you not concerned about the privacy and security of your data (in the cloud)?

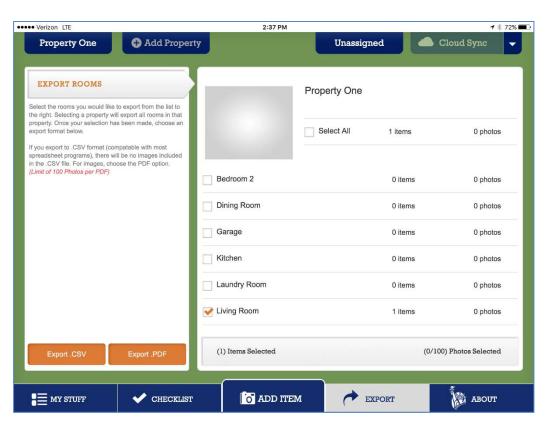


Task 8: Application Retrospective: Export and Save (5 Minutes)

Let us assume you have entered all your personal possessions into this application. Did you see anywhere you could send the personal possessions you tracked to yourself or someone else?

| SO | meone else? |
|----|--|
| • | How would you want to have a copy of everything you entered? |
| • | How would you organize the list - what options would you like to have? |
| • | What format would be most useful to you? |
| • | How would you want to get a copy of this list? |
| | |





Post-Task Questions (10 Minutes)

| 1. | What is your overall impression of the app? Please give the app a grade from "A" to "F. | | | | | | | |
|----|--|--|--|--|--|--|--|--|
| | Grade: Why did you give this grade? | | | | | | | |
| 2 | If you could make changes to the app, what would they be and why? Is there any key | | | | | | | |
| ۷. | functionality missing that you feel would help you track what personal possessions you | | | | | | | |
| | own? [As appropriate, allow participant to go back to the app.] | | | | | | | |
| 3. | What did you like best about the app? | | | | | | | |
| 4. | . What did you like least about the app? | | | | | | | |
| 5. | Have you ever used other applications similar to this one? | | | | | | | |
| 6. | If you did not choose to register initially when you opened the app, why not? Having used the app, would you register it? Why or why not? Do you see any value in registering? | | | | | | | |
| 7. | . How many items would you expect to add to this app in order to catalog the personal possessions in your home? How long do you think that would take using this app? | | | | | | | |
| 8. | 8. Do you think you would or would not need to update your possessions? How often? | | | | | | | |
| | 8. Using the following scale, where 1 is Not At All Likely and 7 is Very Likely, how likely or unlikely would you be to use such an app in the future? Why or why not? | | | | | | | |
| N | ot At All Likely Likely | | | | | | | |
| | 1 2 3 4 5 6 7 | | | | | | | |
| | | | | | | | | |

Emotional Response (5 Minutes)

Here are a number of words that help describe how you feel about this application. Please select the top three words that describe your reaction to using this app to keep track of all your personal possessions.

| Appealing | Fun | Organized |
|--------------|---------------|-----------------|
| Busy | Hard to Use | Overwhelming |
| Clean | Helpful | Practical |
| Confusing | Impractical | Professional |
| Credible | Inconsistent | Relevant |
| Cutting edge | Innovative | Responsible |
| Easy to use | Intimidating | Straightforward |
| Effortless | Intuitive | Trustworthy |
| Engaging | Irrelevant | Unhelpful |
| Frustrating | Irresponsible | Unreliable |

Outline of Tasks: Encircle

Task 1: App Search and Download (5 Minutes)

• You want to find and install an application that will allow you to create and store a list of your personal possessions. Please show me how you would proceed.

Task 2: Walk-About for 2-4 Personal Possessions (20 Minutes)

• You now have the application on your device. Go ahead and start the application. Assume you would like to track some of the personal possessions in your home/condo/apartment. Please walk me through what you would do.

Task 3: Application Retrospective: Sign Up/Log In Screen (5 Minutes)

• Let us start back at the beginning. You downloaded the application and were greeted with sign-up screen. Did you understand this screen?

Task 4: Application Retrospective: Property Setup (5 Minutes)

• Did you notice anywhere in this app where you could enter information about your home, condo, or apartment?

Task 5: Application Retrospective: Adding Items (10 Minutes)

• During your walk-about, you went through the process of tracking some of your personal possessions. Walk me through the process again. Is this what you expected to do? How would you have wanted to "start" the process?

Task 6: Application Retrospective: Export and Save (5 Minutes)

• Let us assume you have entered all your personal possessions into this application. Did you see anywhere you could send the personal possessions you tracked to yourself or someone else?

Task 1: App Search & Download (5 Minutes)

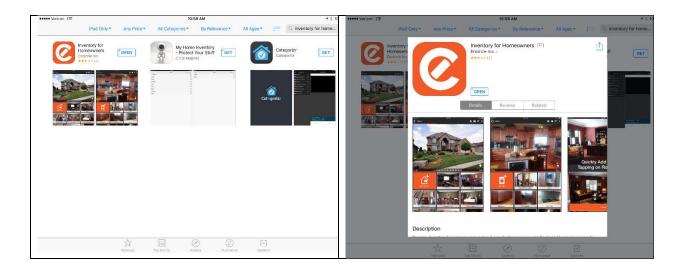
APP: Encircle

You want to find and install an application that will allow you to create and store a list of your personal possessions. Please show me how you would proceed.

Task Questions

1. How would you find it? What would you expect this application to be called? [If they need help, go to App Store and search for "inventory for homeowners" to find Encircle.]

2. Please install the application on your iPad.



Task 2: Walk-About for 2-4 Personal Possessions (20 Minutes)

You now have the application on your device. Go ahead and start the application. Assume you would like to track some of the personal possessions in your house/condo/apartment. Please walk me through what you would do.

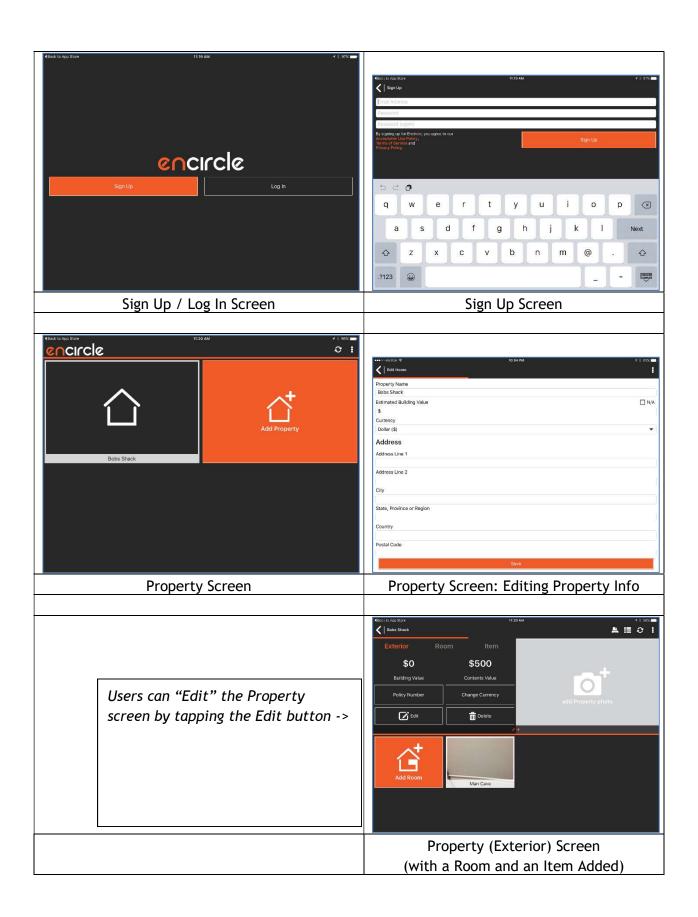
Task Questions

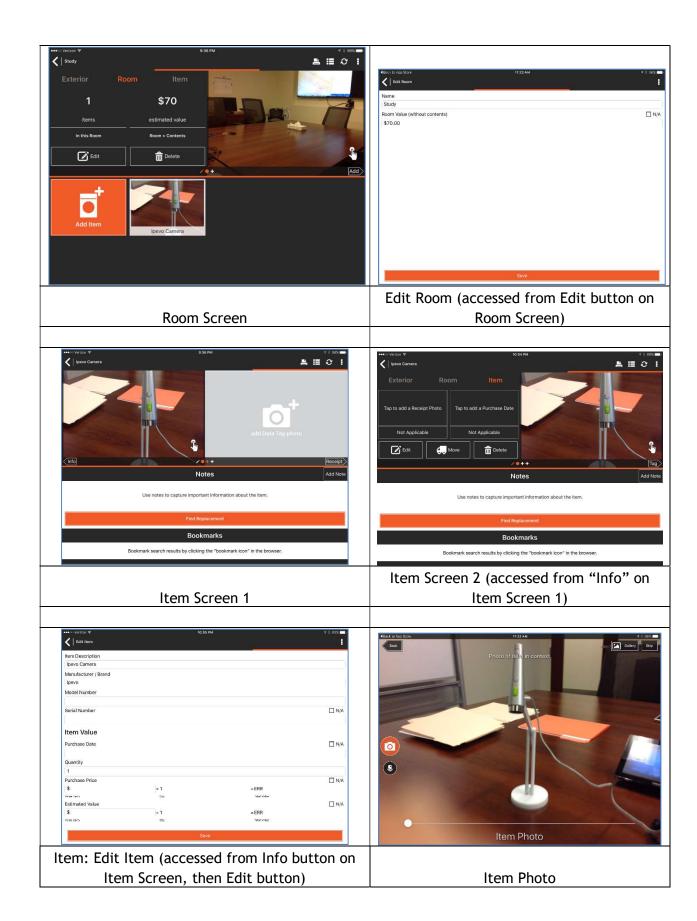
If you can speak out loud as you're completing this task, I will just listen, and not interrupt.

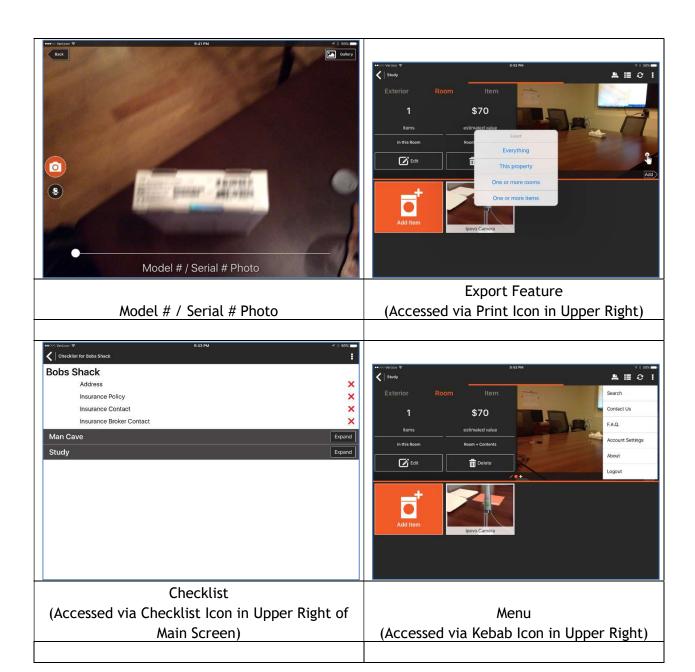
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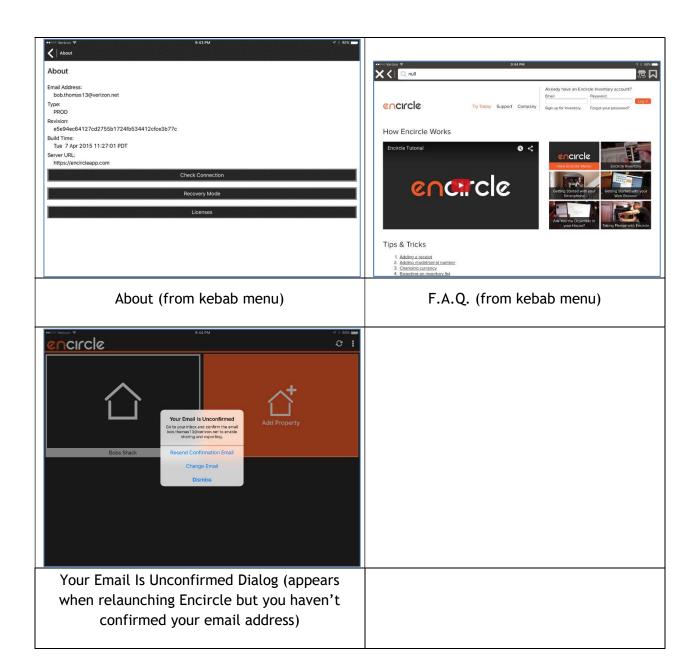
Where they want to start (by item, by room, by category)
Do they follow the tutorial? Are they able to understand it - does it help/hinder?
What causes confusion?]

[Allow participants to select 2-4 items of choice, and watch them walk through the process. After they have captured 2-4 items, end the task and return to a seated area.]







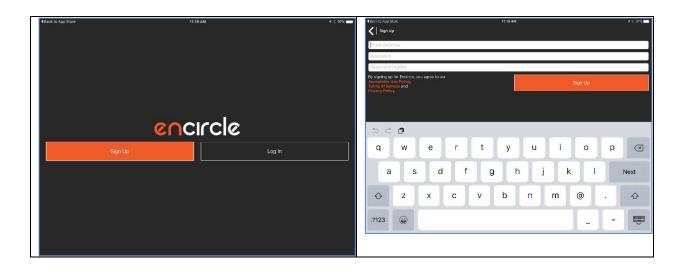


Task 3: Application Retrospective: Sign Up/Log In Screen (5 Minutes)

Let us start back at the beginning. You downloaded the application and were greeted with the Sign Up/Log In screen. Did you understand this screen? How would you describe it to someone else?

NOTE TO MODERATOR: What would participants enter for their email address? Would they continue or exit when faced with this screen?

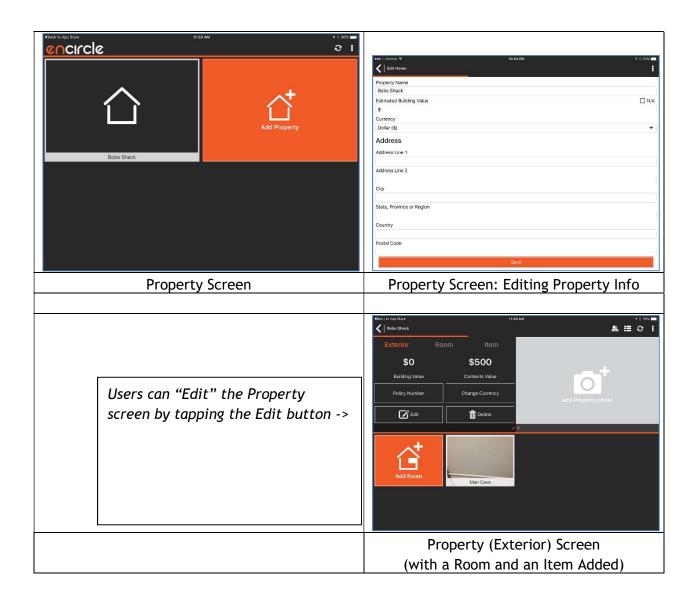
- [if necessary] How would you expect this screen to work?
- [if necessary] What would make this screen easier to understand?
- [if necessary] Would you sign up? Why or why not?



Task 4: Application Retrospective: Property Setup (5 Minutes)

Did you notice anywhere in this app where you could enter information about your home, condo, or apartment?

- Is this what you expected to do after adding a property to the application? How would you have wanted to "start" the process?
- Was it clear to you where you were in this process?



Task 5: Application Retrospective: Adding Items (10 Minutes)

During your walk-about, you went through the process of tracking some of your personal possessions. Walk me through the process again. Is this what you expected to do? How would you have wanted to "start" the process?

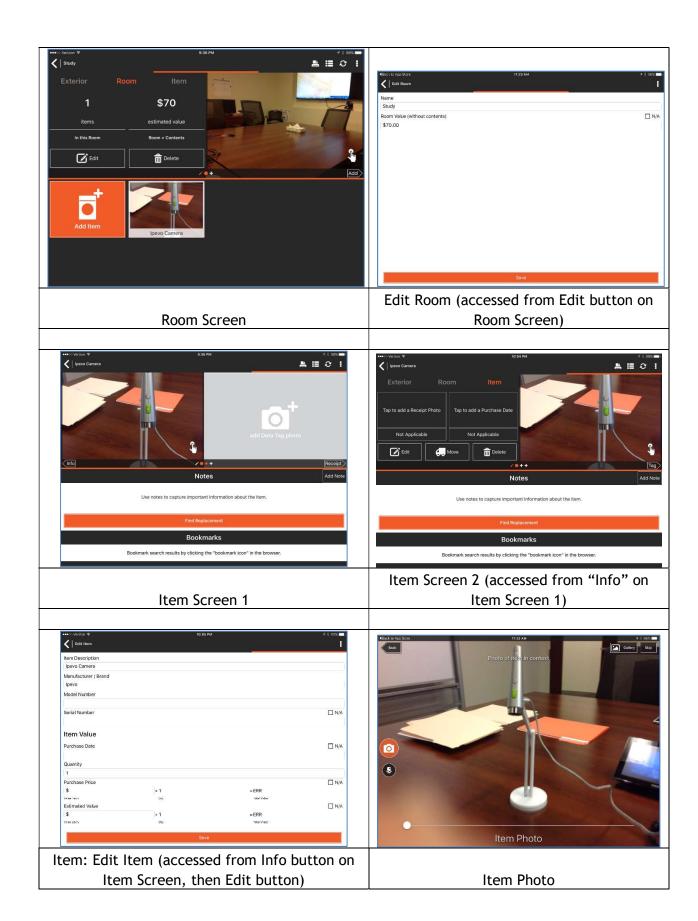
| A c | dd Item Screen/Select Room Did you understand this screen? |
|------------|---|
| • | Is this what you expected to do after adding a property to the application? How would you have wanted to "start" the process? |
| • | [if necessary] How would you expect this screen to work? |
| • | [if necessary] What would make this screen easier to understand? |
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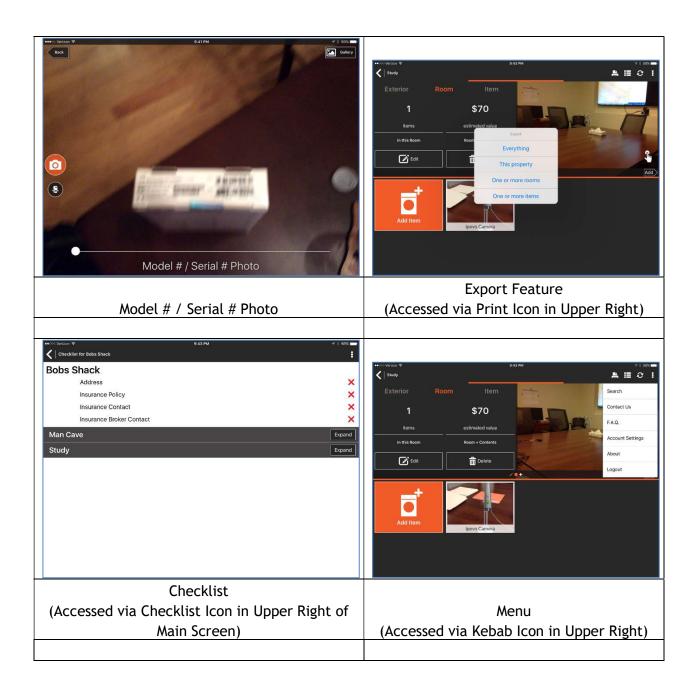
Photo Capture

- 1. Is this how you expected to begin entry of your personal possessions, by taking a photo? Comment on your preferred approach.
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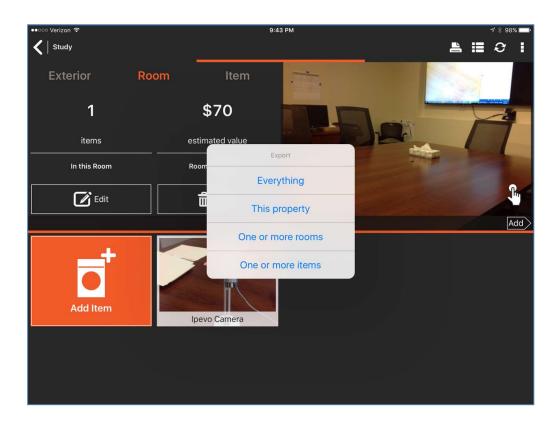




Task 6: Application Retrospective: Export and Save (5 Minutes)

Let us assume you have entered all your personal possessions into this application. Did you see anywhere you could send the personal possessions you tracked to yourself or someone else?

- How would you want to have a copy of everything you entered?
- What format would be most useful to you?
- How would you want to get a copy of this list?



Post-Task Questions (10 Minutes)

| 1. | What is yo | our overall in | npression of t | the app? Plea: | se give the ap | op a grade fro | om "A" to "F |
|----|---|---------------------|----------------|----------------|----------------|----------------|----------------|
| | Grade: Why did yo | ou give this gr | rade? | | | | |
| 2. | If you could make changes to the app, what would they be and why? Is there any key functionality missing that you feel would help you track what personal possessions you own? [As appropriate, allow participant to go back to the app.] | | | | | | |
| 3. | What did you like best about the app? | | | | | | |
| 4. | What did you like least about the app? | | | | | | |
| 5. | Have you ever used other applications similar to this one? | | | | | | |
| 6. | ORIGINAL SIGN-UP SCREEN: Having used the app, would you sign up to use it? If so what would you enter for an email address? [NOTE TO MODERATOR: want to see if they would enter a real email address] Would you continue or exit when faced with this screen? | | | | | | |
| 7. | . How many items would you expect to add to this app in order to catalog the personal possessions in your home? How long do you think that would take with this app? | | | | | | |
| 8. | . Would you need to update the app? How often? | | | | | | |
| | 8. Using the following scale, where 1 is Not At All Likely and 7 is Very Likely, how likely or unlikely would you be to use such an app in the future? Why | | | | | | |
| N | lot At All Likely | | | | | | Very Likely |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| | | | | | | | |

Emotional Response (5 Minutes)

Here are a number of words that help describe how you feel about this application. Please select the top three words that describe your reaction to using this app to keep track of all your personal possessions.

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|--------------|---------------|-----------------|
| Busy | Hard to Use | Overwhelming |
| Clean | Helpful | Practical |
| Confusing | Impractical | Professional |
| Credible | Inconsistent | Relevant |
| Cutting edge | Innovative | Responsible |
| Easy to use | Intimidating | Straightforward |
| Effortless | Intuitive | Trustworthy |
| Engaging | Irrelevant | Unhelpful |
| Frustrating | Irresponsible | Unreliable |

COMPARE: Which app would you be more likely to use, and why?

- 1. Which of the 2 apps would you be more likely to use in the future, and why?
- 2. Using the following scale, where 1 is Not At All Likely and 7 is Very Likely, how likely or unlikely would you be to use this app in the future? Why

| Not At All Likely | | | | | | Very Likely |
|----------------------|---|---|---|---|---|----------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |