

Usability Contextual Inquiry Turn Console

Summary |

Background

Turn redesigned the Turn Media Platform (Console) from the ground up and re released the new application to its clients. Many clients have come back to Turn with requests for feature/usability enhancements. Our goal with the Contextual Inquiry is as follows:

- Test our assumptions of our current User profiles - redefine if necessary
- Understand each User profile's primary use case/work flow within the TMP
- Observe each User (when possible) in their native work environment using the TMP
 - When this is not possible we will ask them to walk through their use over GoTo meeting so we can observe screen movement

What We Tested

What we test within the TMP may be varied based on the User and what their specific job function is.

How We Tested

The basis of the Contextual Inquiry is to observe a user within their native environment in order to understand who they are better and how they function within their workplace. By watching, learning and listening to the User's in a more free form way we are able to summarize from more from how they do what they do rather from what they say they do.

Introduction/Interview

During this phase we meet the User in their environment and let them know that we are there to observe them in the process of doing their task. It is during this time that we tell them what it is we are interested in. One person typically runs the session while the other takes notes. After the intro, the User is interviewed in a non leading way, where they are asked questions that are helpful in the overall information gathering session.

Master-Apprentice

After a 10-15 minute interview we then change gears and let the User know that we are going to be learning from them and they are to teach us by talking out aloud about what it is they are doing. At this point, depending on what they are doing it is important to know whether we can engage them in conversation without interfering (dependent on task-customer facing etc.)

Observation

We observe the User in action regarding the task or tasks that are of interest to us. It is important to interrupt and ask questions when necessary that are relevant to what they are doing, how they do it and why they do it in that way. It starts to get interesting here because often what they said in the Intro/Interview can be validated or be the opposite of what they said/think/perceive.

Summarize

The last ten minutes we take to summarize what we have seen and validate that with the User to make sure we got it right. The summarization can include observations about behavior, but it is important not to point out things that could potentially embarrass the User such as inconsistencies etc. Each Summary should be recorded and the final document should have the summaries with observations from all summaries. It is important after the inquiry that you and I regroup and agree on our observations with each User

Who We Tested

Professional Audience

Participants were selected based on their experience and availability.

- 3 men, x women
- The following job titles: Campaign Manager, Trafficker/ Campaign Engineer
- All actively use Turn Console in their day to day operations

Job Descriptions

Trafficker/Campaign Engineer: Set up campaign shells, implementing creatives – receive, upload into system, assign to campaigns and unassign, tagging strategies, beacon creation and assignment, create and maintain site lists, QA – overall campaign life cycle

Campaign Manager: Manage campaigns to make sure it is on budget and meeting client's expectations, work with Client Services team, target effectively and achieve best ecpm

Primary Use Cases

Interview Notes

02/01/11

Trafficker/Campaign Engineer: Cadreon, Detroit

Virtual meeting

What is your current title and function within your organization?

Sr. mgr. of trafficking—heading up for Chrysler-set up campaign shells and implementing creative and tagging strategies.

How do you use the Turn Media Platform within your job role or what are the primary tasks you do day to day within the TMP?

All based on creative library-assigning and unassigning, adding new creative, and implementing creatives. I do make shells of packages, I only partly do it now and more responsibility in 6-8 weeks.

Have you used other Advertising Platforms in the past to accomplish the same tasks?

DFP, DFA, OpenX, Mediaplex, Atlas

If so, how do you rate Turn's performance in comparison?

Turn is a 5 and other platforms are an 8 or 10 and it takes 14 days and others take an hour and a half. Still developing into an ad server and there are some enhancements you could make and there is a list I have expressed.

If there was one thing you would like to change about the TMP what would that be?

The big win enhancement would be a two way street-ability to assign and un assign. I un assign creatives at least once a month. RAM commercial have medoing a huge creative swap out every 6-8 weeks.

I ask User to take us through a day-in-the-life of how they begin their day and use the Console.

Start walk through:

Starts at the Advertising tab always

Clicks on Chrysler

Clicks on Creatives-loads the creative library for the Advertiser

Searches on Avenger creative

He puts the creative into the system and he always puts the date on the end

He then selects the creatives he wants to assign

And he goes to 'assign creatives'

It takes forever for the creatives to load and it takes awhile to come up

(Looja explains that this may be a technical issue due to the assign)

He then clicks on the plus sign to the left of an IO to Dodge

-sometimes if he clicks on the plus sign nothing happens

-so when this happens as it did it "cripples him"

(Looja says it looks like connection dropped out during the IO opening)

Often it takes a very long time to process the assignment

Assigning a Creative:

With an unassign: every creative that is assigned to a package in the IO is a complete swap out—it could be everything on a specific name plate. It depends –the name plate is a package.

He would like to do everything at once. In one platform it shows the packages assigned to and if I uncheck them and hit save it unassigns them from those packages.

If you reverse the process for assigning for unassigning then it will make sense to him. If you unassign then you would not see the creative in the monitoring pages. It would keep it in the library—it would be paused. If we set the creative to a 'deleted' status and did not show it then this would work.

Need to have different colors for the play/pause

The workflow is correct-we need to work with Louis to make this work right for you

Something very beneficial-a start and end date to creative. It would be helpful to have flight dates.

If you have a creative with a flight date and when it reaches the end date it would auto pause when you reach the stop date the new creative starts. If there is not a successive creative that is OK because it is up to the trafficker

Uploading a Creative to the System:

Has a rich media file-he receives an excel with tags

Opens zip file with 357 creatives

Copy creative and do one by one

Hits new creative

Would never use a zip upload because they are TPAs

Selects first screen

Should not have to hit 'add more' to input first creative

When adding a creative would like to upload and have it it auto detects type of file and then all he would have to do is paste in 3rd party tag

Would like to have size auto detected and does not like auto insert URL

Will always check to make sure creative is working correctly-always flipping backing and forth

Sometimes use more fields and does not like having to click 'show fields'

Commonly adds more than one creative

Would like auto detect for the fields

When I hit the 'add more' and if I forgot to add a name the system allows me to keep the creative name as 'default'. That is a big problem for me. Need to be able to edit the details of the creative and not able to do this **(JIRA this)**

If I save the creatives in the Obtain Creatives step—he hits save and he can not hit next or close out. He has to log out. (added to JIRA)

Attributes-there should be default checks for attributes for certain clients and the scrolling bugs him (added to JIRA)

Expects cancel to take him back a step from attributes not get out completely

If he needs to reedit-it is really difficult that he may need to go into every creative to apply attributes—needs to bulk apply

Unassign Creative:

Currently, to unassign a creative, he goes to advertiser and selects the Adv.-hits Chrysler and goes to Fiat. Selects an IO and in monitoring he wants to be able to unassign. He does not know if you delete a creative if it is totally gone or if it goes away by default. He thinks the creative is removed from the library—he wants a soft delete where it is hidden from view. If you pause a creative it should also pause the ad. He would like to be able to select ads and pause or the creatives from – he wants to bulk pause in the ads tab.

(Looja) You have to have an unassign functionality and it is not intended for the monitoring-it should happen from the creative library. You should not be managing from the monitoring page—Jeff agrees.

If he is in package level he would like to be able to do it at the package level (?)

Likes the 1 2 3 4 5 steps in the turbo mode in creative library.

Beacon Selection:

In the behavior builder-you have to select the beacons one by one and there can be 90. Would like to be able to select multiple beacons.

02/05/11

Trafficker/Campaign Engineer: Cadreon, SF

On site meeting

How do you use Turn Console within your job role?

Mostly I am in the creatives section or doing QA.

What other Ad Platforms have you used?

OpenX, DFA, DFP, Atlas, pretty much everything.

Can you tell us how your day is structured?

I check email, callabrate a campaign, create new tags, QA the tags, start uploading creatives, stuff like that.

Primary areas of the Console you focus within?

Setting up an IO, Advertisers tab, Creative Library, Beacons and Site Lists.

I am within Beacons several times a day-create, change, view through and DMX piggybacks.

Create a Beacon:

Beacon reqs come in at all times of the day.

Beacons are created, and monitored to make sure they are firing.

RMX piggybacks have to be added.

Beacon requests come in from CS in an excel spreadsheet with urls etc.

The spreadsheet was put in place by Walter.

By default it is set as a default beacon - need way to specify that beacon is unsecure.

Need more understanding about piggybacking process with RMX.

Would be nice to see today's fires from the list page.

Would like to have beacon information within the expanded row that has information on other stuff within a Package-this would be helpful

Uploading Creative:

Bulk upload of TPA tags (ATLAS-html+excel/DFA-excel - zip-pointroll) - this would save hours of time for him and untold frustration with the system

If he could import an excel sheet that could also translate all the information into the fields this would be very helpful as well.

Adding more than 10 creatives at a time slows down the add dialog to render it unusable.

Doesn't matter if its a tpa tag, image, or swf - all are slow

He uploads up to 300 creatives per campaign (specials, promotions, designs)

He really wants a setting for 'no attributes' by default.

After he manually uploads the first creative the system should default the settings to the last creative, this would make it easier

Saving after setting attributes does not go back to creatives list page.

He is not able to delete more than one creative at a time, which has been really frustrating for him.

Unassign creative flow works.

02/05/11

Campaign Manager: Cadreon, SF

On site meeting

How do you use Turn Console within your job role?

I manage delivery. I am always optimizing, forecasting potential spends, developing behaviors, trying to meet client goals with their spend.

What other Ad Platforms have you used?

Invite Media, Media Math primarily for reporting insights

Can you tell us how your day is structured?

I am currently running four clients within the Console, I constantly check % of flighting to spend, prioritize each client, trying to boost spend, cut back different IOs, I check previous days spend and see it is trending in right direction. If not, I do a deeper dive and see whether I should increase or cut out tactics.

Primary areas of the Console you focus within?

IO analysis screen-checking the trends. Then I dive into the individual packages. I try to keep line items un customized as daily caps are low in the beginning and I tend to be aggressive with daily spend and asap delivery. I like to do reporting and I find it easier in excel.

I ask him to walk us through a beginning of his day scenario:

Opens 4 tabs in Advertiser for his different clients

Looks at delivery

He chooses Fiat-nothing is customized

-Likes to look and see if daily cap was reached and he wants a slider right here to emphasize type of delivery he wants-he can do this at the package level

He forces ones that meet the daily cap to play again and then reverts it

Checks the delivery of campaign from yester4day to today

Would like to be able to set up reports the send him daily excel sheets on his campaigns

In the Dodge campaign he wants to cut back on the daily spend

He then opens a calculator abd calculates the TAC with the budget to figure out percentage of daily spend-he realizes he is spending \$1K per day so he may pause the ad

Only set caps on packages that are ahead

Media planners always want even delivery

Use calculator/pen paper for tracking % budget spend by each package to figure out budget caps.
Then use package editor to set budget cap
Performance metrics are tracked, but mostly focus on delivery

Need a way to reset packages to how they originally were - in case the config was changed in end of december to accelerate delivery or other factors.

IO Details:

His schedules are really, really long

Each client has a different performance metric he needs to keep in mind

What % of spend goes to each package- he uses the calculator again\Figures he should have a lower daily spend to stay within his budget

Monitors RTBs and then may move some over to RMX manual to manipulate performance

He wants to know if he can get performance and scale from an RTB and whether he wants to create a manual buy

Goes to a Publisher line item to set up a manual RMX manual buy

He wants to see if another Inventory source will work better than another

RMX line items - launched when RTB delivery is not enough.

Y inventory performs well for most clients

Pub Services have set up RMX line items for targeting (eg autos)

Margin pricing set by default to 40% for market managers - change to unset by default.

Campaign Engineers - set up a skeleton (pricing/budget/targeting)

CM provides the media plan and CE implements

CM does qa and sets it live

Sometimes if campaigns come in late, CMs implement it themselves

Rarely jump from client to client - focus on one client at a time.

No client contact usually but provide consultation or post mortem reports.

Create New Line item:

He wants the margin pricing unchecked by default
In an ideal world he says that prior to a campaign beginning he creates a media plan which makes it easier for everyone including the Traffickers

With a client like Chrysler this is difficult-the team in Detroit goes crazy with tactics

Behavior Builder:

He does this primarily for Microsoft

He runs an audience report or a site report he sees what niche sites are performing and he might create a behavior from that

For instance he created a specific behavior for BMW with realtors because he saw that there were a lot of impressions coming from a realtor site

Everyone gets pretty good perf from RT or RON.

Velocity is useful when competing with specific media type competitors.

Fix the bug that doesnt allow multiple selection of creatives from LI/pkg editors.

Invite: super simple. service rep made optimization changes.

Can you set up alerts? He was not sure.

Ad networks are shady, and take advantage of LTA etc.

xcel:

Days remaining, needed spend, # days passed, # days remaining.

Atlas data is not fed into Turn.

End of dec was a rough time - console was up and down.

High Level Summary of Participant Feedback: Top 10 Findings

Top Finding: #1

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Top Finding: #2

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