

Usability Participant Testing Report

Turn Console

Executive Summary |

Background

Turn has spent the last year redesigning the next generation of the Console. The most recent iteration focused on the simplification of the IO creation workflow into what is called the “Turbo Mode Setup”. Tests were conducted on two different target users. The first group included both Cadreon and Turn Campaign Managers who are advanced system users. The second group included OMG who are novice/intermediate system users. It should be noted that some Cadreon Campaign Managers had briefly reviewed the Turbo Setup wire frames a month prior to the Testing.

What We Tested

The Usability Test was structured to address prioritized areas and functionality of the new Turbo Setup demo, which was live and fully functioning. The Test focused on the IO creation workflow and the new Analyzer. Participants were asked to set up an IO, create two Packages, review the Display Package and Overview screen. Once the IO was complete, Participants were asked to launch the IO and review the new Analyzer.

How We Tested

To ensure consistency throughout Testing, a Usability Test Script was prepared and read to Usability Participants by the Usability Moderator, Pamela Hadfield. In total, thirteen unique screens were used seen within the live demo. Usability Participants were guided through a series of scenarios and tasks while being asked scripted questions throughout the process. At the end of the session, Participants were solicited for their feedback and were allowed to ask questions about what they saw. The test lasted about one hour with each Participant.

Test Environment

The Test environment was informal and conducted either within the Participant’s work environment or over GoToMeeting. Usability Sessions were performed in a Turn conference room, at the Cadreon office in SF, CA and over GoTo Meeting with OMG employees in Chicago. During the Test, a Participant sat at a PC while the Usability Moderator guided him or her through the Usability Test Script. When possible, a member of the project team observed the session and took notes.

Who We Tested

Professional Audience

Participants were selected based on their experience and availability.

- 6 women and 4 men tested
- 8 advanced users, 1 intermediate user, 1 novice
- All use Turn Console: 8 Campaign Managers, 1 Traffic Coordinator, 1 in training
- 6 had brief exposure to the Turbo Setup wire frame (pre visual treatment), 4 had never seen it

Goals

The overarching goal was to gain as much input as possible from target users in order to provide specific feedback on the features and functionality. As this is the first Usability Test to be conducted on Turbo Setup, our primary goals are to:

- Gauge Participants reactions to the new Turbo Setup and find out whether they view the new design iteration as an improvement over the current Console
 - Do Participants perceive this to be more efficient and easier than the previous version of the Console?
 - If not, why?
- Solicit specific feedback on the Turbo Setup functionality:
 - Creation of IO/Package
 - New stepped process
 - Line item customization
 - Package Details and Overview page
 - Analyzer
- Walk away from Test with a solid understanding of the Participants perception of new Turbo Setup and what areas need further refinement

Some questions that we hope this Test will answer are as follows:

Do Participants understand:

- How to enter and progress through the IO creation workflow?
- That Turbo Mode Setup is more efficient with all the complexity of the current system?
- Understand the streamlining of IO creation into the Package level?
- How to customize Line items in order to have more advanced control of their Campaign?

High Level Summary of Participant Feedback: Top 10 Findings

The following is a Top 10 Findings summary compiling the overall feedback Participants gave into a quick hit list. The numerical value does not determine importance of the finding.

Top Finding: #1

All Participants immediately understood how to enter and move through the IO to Package creation process.

Participants were started on the IO listing page and asked to create a new IO. All Participants clicked on the 'New IO' button easily and entered the IO creation process. Once on the new Turbo Setup page, most users commented on the three step process flow up top. Many commented "This is a three step process" to launching an IO, and all who noticed this liked the high level guidance. One user said "The process flow is helpful and an intuitive aid".

After creating their IO, all Participants understood that the next step was to create a Package and all Participants easily found and clicked on the 'New Package' button. Once Participants were within

the 1st step of the Package creation process they were able to tell the Moderator what had occurred and accurately described that they were in the 1st step of creating a Package.

All Participants except for one, agreed that the new flow was more intuitive based on the process flow up top and the stepped process within Package creation. One user commented "It looks a lot cleaner and it looks a lot simpler which is better for the User Experience." Another commented that "I like that it spells everything out." Three Participants wondered aloud if there might be too many steps in the package creation process and whether there might be 3-4 steps rather than 5.

Only one Participant complained that the new process was a step down from the current system. His main criticism was that he preferred all information on one page and that the step by step process made him click a lot more. He commented that "I see how this may aid new users but I prefer the current Console and all the advanced features it has".

Top Finding: #2

Advanced Participants were confused by the frequency cap on the Details page in step one.

Almost all Participants struggled to understand the frequency cap checkboxes on step one. Most Participants struggled to understand what the frequency cap was applied to if they were not selecting inventory sources at this point. Some seemed confused that frequency cap was on step one and at the Package level. Participants also wondered why frequency cap was at this level and why one option was hidden from view. Participants became slightly less confused when new wording was applied to the selections halfway through the test.

Top Finding: #3

Many Participants were confused after completing the Details in step one as to what they should click – 'Save' or 'Next'.

Many Participants wondered aloud whether they should click on the 'save' or 'next' button after the first step. One person commented "Well, I would probably be OCD and click save and then click next but if I click next does it still save?" Most Participants guessed that they should click on the 'next' button but most Participants paused and wondered what they should do. Many people wondered why they should save their work at this point.

Top Finding: #4

All Participants were able to use the targeting step within Package creation but almost all preferred the current targeting module which is contained within the 'advanced targeting' area.

Targeting has been broken out into 'simple targeting' and 'advanced targeting'. Most users were able to explain why a user might use simple targeting but all users including the intermediate and novice users indicated they would use the current targeting module contained within advanced targeting radio button. When asked why they would use the advanced targeting module most agreed with one Participant's comment that "the module was intuitive even for a new user". Another Participant commented "a new user will easily understand how to use this." (the targeting module).

Most Participants did not understand that the checkboxes within simple targeting were not mutually exclusive. Most people checked a checkbox and then unchecked it before checking another. Many people were confused that the targeting tactics available within simple targeting were then also duplicated within the advanced targeting. Three users tried to use the checkboxes within simple targeting in conjunction with the advanced targeting module.

Top Finding: #5**All Participants easily completed the Bidding, Pacing & Budget and Ad creation steps within Turbo Setup.**

All Participants easily understood and completed steps 3-5. At least three Participants inquired about the use of multiple beacons on the Bidding page and two Participants were slightly confused by the beacon having a goal value to the right of the beacon in the Beacon module. Most Participants who saw the Third Party Costs module were interested and commented that this would be a new useful feature to them. All Participants liked the current ad creation process but many commented that having a creative library would be very useful and more efficient.

It is interesting to note that all Participants while within the ad creation module automatically opened the ad attributes section and entered in "No attributes" within each sub section. At Cadreon, several Participants saved the ad and then went back to approve the ad. When questioned further, a Cadreon employee said that it would "make my life easier to be able to approve the ad prior to saving it".

Top Finding: #6**All Participants liked the Display Package screen after completing the Package creation process but the line item sub section caused questions for everyone.**

After saving a Package, all Participants understood the Display Package screen. One Participant commented "This is the recap of my Package and where I might go to confirm my settings prior to launch". All Participants understood the different sections and how they related to the Package creation process. That said, most Participants paused when they saw the line item sub section. Most advanced users noted that this area is where all the inventory sources that are used would be displayed. Most Participants that became confused noted that "I have not pre selected these inventory sources" or they wanted to know how they might deselect an inventory source prior to launching. Some Participants commented that the status was pending and they wanted to change the status prior to launch.

All Participants easily found how to customize a line item as well as how to edit a Package. It should be noted that most advanced users of the system noted that prior to launching an IO they might not customize any line items but over the life cycle of the Package they might customize every line item in order to have better optimization.

It should also be noted that many Participants after seeing the Display Package screen did not grasp that the IO was not live. Many Participants commented that they wanted to see "data points" and that they hoped there would be monitoring type information available here.

Top Finding: #7**Customization of line items was understood easily, but Participants did not understand how a Package edit might then affect a customized line item.**

Many Participants commented that a Package edit would not affect a customized line item but just as many Participants thought that a Package edit would affect everything in the customized line item except for the one thing they had changed.

For instance, in our test we changed the bid in the line item so that it became a custom line item. The Moderator then said "If we edited the targeting within the Package, how would that affect the customized line item?" Many Participants commented that the targeting would also change within the customized line item, but not the customized bid.

Many Participants brought up the idea of bulk editing at this point. One Participant commented that he would want the line item to stay customized and apart from the Package edits but that it would be nice to have a line item bulk edit feature. Another Participant commented that she would want to see a grid of all the edits within the line items so she would not need to drill further into each line item. She said if she could roll over the custom line items and a grid popped up or a separate window with all the changes on one screen it would be very helpful.

Many Participants said that within the line item table they would want to see what had been customized. One Participant suggested a roll over so she could quickly scan her customizations without digging deeper into the line item itself. This particular Participant said that her main complaint of the current console was that you had to dig into everything to deep. If she could see her customizations quickly in this table it would be very helpful and useful to her.

Top Finding: #8

All Participants understood the value of the Overview screen but almost every advanced Participant noted that the information was too high level.

Most Participants said that this screen could be useful but currently lacked enough in depth. In particular, most Participants commented that the targeting information was too high level and that there needed to be more specifics available, perhaps with a roll over. In addition, most Participants commented that the budget should be specified here and that listing 'auto' or 'manual' was not enough information. Some Participants noted that it would be useful to know if line items were customized, how many and what was changed. Two Participants said that they would like the row to expand and be able to see all the rows expanded across. At this point, several Participants mentioned that the value of this system would be to see many things in one place.

Top Finding: #9

When Participants were asked to make their "IO go live" many tried to click the process flow up top but just as many understood they should click the 'Launch IO' button. No Participants clicked or mentioned the Analyze button next to the 'Launch IO' button.

It should be noted that the two novice Participants were confused when asked to make their "IO go live". The novice Participants thought they should activate each Package individually and/or deselect inventory sources prior to launching. The pending icon in the inventory sources seemed to confuse them and one Participant wondered aloud if she "needed to approve the Package or inventory source" prior to launching.

Once Participants clicked the 'Launch IO' button they were very interested by the 'Analyze' button and everyone wanted to see what might happen.

Top Finding: #10

All Participants were excited by the Analyze feature and every Participant said they would use it, assuming the recommendations were useful.

All Participants were excited by this new feature. The more advanced Participants were enthusiastic that the system could be used as a "double check" or a "second set of eyes". Most Participants immediately upon entering the Analyzer hit the 'expand' under the first message. Most scanned the messages and then hit 'details', although some Participants did not see 'details'.

One Participant made the comment that "'Details' should come before 'edit' as that is what I want to do first". Two Participants said that a lot of the information seemed repetitive and only one Participant said that the long list seemed overwhelming. Many Participants did not notice the 'show more' link at the bottom unless prompted. At least two Participants commented that the different sections needed headings in order to appear better organized. Many Participants commented that they would analyze their IO, make changes and then analyze again. When prompted, all Participants were able to accurately assess that the icons varying sizes indicated criticality.