

**Client:** Client  
**Project Description:** User Research  
**OTIVO Project Number:** CL07001  
**Date:** March 2008

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## Overview

Client is interested in user research for their wireframe information architecture and alpha web site. The purpose of this usability research is to analyze the application in order to understand how it does or doesn't meet the objectives, how people use it, whether or not they can use it easily, as well as where and how to improve it.

Research objectives and goals will be determined and finalized throughout the timeline of this project. Some initial objectives and goals have been identified. These will be prioritized and further defined before the research begins:

- Analyze the first-time user experience – does it compel a user to register, upload, create and publish?
- Analyze the returning user experience – is repeat usage encouraged? Is there sufficient customization and control for returning users? Are there appropriate shortcuts?
- Analyze the number of steps to complete task – what are the problems, if any, with quickly uploading and creating and publishing?
- Discover what makes sense and what is a barrier for producers to continue using Client
- Discover the benefits and drawbacks of the Client interface, specifically with features such as drag and drop
- Discover the perception of the amount of time required to complete a task
- Do first-time users want a tour or a walkthrough?
- Are there any positive or negative comments from users about the use of Flash?
- How do users describe Client at various times throughout their use of it? (first impression, after 15 minutes, after successfully completed task, after 1 week)

This statement of work outlines OTIVO's services, deliverables, schedule and fees for web site usability research.

One usability research specialist and an assistant will work on the project to:

- (1) review and define objectives for usability research
- (2) manage the administrative details of recruiting and facilities and video recording;
- (3) develop screener for recruiting;
- (4) recruit and schedule participants and floaters for usability sessions;
- (5) develop test plan for user interviews;
- (6) moderate 6 individual interviews with users in San Francisco at OTIVO's Usability Lab before users use the web site and then moderate 6 interviews with users after they've used the web site;
- (7) moderate user behavior during a week of using the web site;
- (8) develop and deliver report of the usability tests' findings and recommendations;

- (9) deliver picture in picture video of individual interviews on CD or DVD in QuickTime or Windows Media format;
- (10) if desired, meet with Client to discuss the findings and recommendations.

## Timeline and Description of Services

Dates (2008)	Description of Services
<b>March 3</b>	<p><b>Usability Test Kickoff</b></p> <ul style="list-style-type: none"> <li>• Meet to discuss all of the key pieces of the usability test and learn more about the target users for the web site and expected usage of the alpha web site</li> <li>• Decide on video recording and media (format on CD or DVD)</li> <li>• Finalize outline of description for screening and recruiting for usability participants</li> <li>• Finalize goals and objectives for individual interviews</li> <li>• Develop and deliver outline of project requirements</li> </ul>
<p><b>March 4-5 (screener)</b></p> <p><b>March 6-14 (recruiting)</b></p>	<p><b>Screener and Recruiting</b></p> <ul style="list-style-type: none"> <li>• Develop screener to use in recruiting and scheduling participants and floaters. Each floater covers 2 one-hour sessions in case a participant doesn't show due to inclement weather, bad traffic, or any other reason.</li> <li>• Some screening requirements might be: <ul style="list-style-type: none"> <li>○ Does not work for Client competitor</li> <li>○ Willing to participate in a weeklong study and use Client daily during the study week and come to OTIVO for two interviews</li> <li>○ Willing to sign confidentiality and consent agreements</li> </ul> </li> <li>• Discuss and finalize screener with Client</li> <li>• Recruit and schedule participants for usability sessions</li> </ul>
<b>March 11-17</b>	<p><b>Discussion Guide Development and Test Drive</b></p> <ul style="list-style-type: none"> <li>• Based on the objectives finalized by Client, develop a discussion guide to use in moderating the interviews</li> <li>• Develop instructions for tasks that participants will complete in between interviews</li> <li>• Review current alpha web site</li> <li>• <b>Mar 11:</b> Deliver draft discussion guide to Client for review</li> <li>• <b>Mar 12:</b> Client provides feedback on discussion guide</li> <li>• <b>Mar 13:</b> Deliver 2<sup>nd</sup> draft discussion guide to Client for review</li> <li>• <b>Mar 14:</b> Client provides feedback</li> <li>• <b>Mar 17:</b> Run a practice test ("test drive") of the discussion guide with a Client employee at OTIVO's office</li> <li>• <b>Mar 17:</b> Finalize discussion guide</li> </ul>
<b>March 18</b>	<p><b>Participant Interviews and Data Collection</b></p> <ul style="list-style-type: none"> <li>• Moderate 6 one-hour interviews at OTIVO's lab in San Francisco</li> <li>• Take brief notes</li> </ul>

Dates (2008)	Description of Services
	<ul style="list-style-type: none"> <li>• Record video and audio picture-in-picture</li> <li>• Provide observation room behind 1way mirror for <u>maximum 5 observers</u></li> <li>• Meet and greet, beverage and snack services for observers and participants and floaters</li> <li>• Deliver incentive payments to users</li> <li>• Deliver instructions to users for tasks to complete within a week</li> <li>• Deliver short email report of findings to Client at the end of the day</li> </ul>
<b>March 19-26</b>	<p><b>Moderate One Week of Remote Behavior</b></p> <ul style="list-style-type: none"> <li>• Each recruited participant and floater will be given instructions to complete the tasks within 1 week (the week will be Tuesday-Monday).</li> <li>• Contact participants once per day via email and phone on Tuesday, Wednesday, Thursday, Friday, Monday and ask for feedback, bug reports, feature suggestions, and other opinions.</li> <li>• Send questions (from participants) to Client to get answers, as needed</li> <li>• Deliver short email report of findings to Client at the end of each day with feedback, if any, from participants</li> </ul>
<b>March 19-26</b>	<p><b>Revise Discussion Guide and Test Drive</b></p> <ul style="list-style-type: none"> <li>• Revise discussion guide for 2<sup>nd</sup> interview day</li> <li>• <b>Mar 20:</b> Deliver draft discussion guide to Client for review</li> <li>• <b>Mar 21:</b> Client provides feedback on discussion guide</li> <li>• <b>Mar 24:</b> Deliver 2<sup>nd</sup> draft discussion guide to Client for review</li> <li>• <b>Mar 25:</b> Client provides feedback</li> <li>• <b>Mar 26:</b> Run a practice test (“test drive”) of the discussion guide with a Client employee at OTIVO’s office</li> <li>• <b>Mar 26:</b> Finalize discussion guide</li> </ul>
<b>March 27</b>	<p><b>Participant Interviews and Data Collection</b></p> <ul style="list-style-type: none"> <li>• Moderate 6 one-hour interviews at OTIVO’s lab in San Francisco</li> <li>• Take brief notes</li> <li>• Record video and audio picture-in-picture</li> <li>• Provide observation room behind 1way mirror for <u>maximum 5 observers</u></li> <li>• Meet and greet, beverage and snack services for observers and participants and floaters</li> <li>• Deliver incentive payments to users</li> <li>• Deliver short email report of findings to Client at the end of the day</li> </ul>
<b>March 28-April 2</b>	<p><b>Usability Report Development and Delivery of Findings</b></p> <ul style="list-style-type: none"> <li>• Analyze data and develop report of findings and recommendations and deliver. Report will usually include, among other findings and analysis to be decided: <ul style="list-style-type: none"> <li>○ analysis of objectives and goals defined at the start of the project with supporting quotes from users</li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>○ strengths and weaknesses of the web site (based on user feedback)</li> <li>○ competitive analysis results (if appropriate for the project)</li> <li>○ task analysis results</li> <li>○ prioritized list of recommendations for improvements and features (recommendations will be based on user comments during the interviews)</li> <li>• Edit video and create highlights video with supporting quotes for the findings in the report. Deliver highlights video in QuickTime or Windows Media format.</li> <li>• Deliver picture in picture video of all interviews in QuickTime or Windows Media format</li> <li>• Meet to review findings</li> </ul>

### Usability Video Recording Terms

1. OTIVO will deliver the picture-in-picture usability video to Client in Windows Media format on CD.
2. Client agrees to only use the usability video for internal research, demonstration, and/or evaluation.
3. Client agrees that the usability video will only be shared with or shown to employees and contractors and clients of Client.
4. Client agrees that no portion of the usability video and highlights, including stills, clips, audio, video, in part or in whole, will be published on a publicly available web site or be used for any product or brand or company endorsement.
5. If any portion of the usability video and highlights are shared with or shown to an employee or contractor or client of Client then Client agrees to instruct employee(s) and/or contractor(s) and/or client(s) about the agreed usage of the usability video described in this agreement.