SWAN
Enterprise Catalog Research Proposal

sandstormdesign INC

97% of our clients do repeat business with us

1500:00

Sandstorm has conducted 1,500+ hours of in-depth user research and usability studies

UX

Sandstorm staff spend 500+ hours in learning and training, keeping up to date with the latest trends and insights

DEAR AARON,

Thank you very much for the opportunity to partner with you and your team to conduct usability testing to better understand and improve the user experience for your library consortium. We understand the importance of fielding user research to improve the user experience.

We have reviewed your request and are very excited about your project. As we discussed, we are submitting a proposal for a usability study with your consortium's patrons. We believe our user research methodology will ensure you receive a thorough perspective of your users' preferences. We feel we can leverage our past experience to ensure your research delivers the insights you need!

We would absolutely LOVE this project!

If you have any questions regarding this proposal, please contact me at 773-348-4200 x141. Thank you for your consideration! I can't think of a better fit for Sandstorm.

Sincerely,

Laura Luckman Kelber, Chief Strategy Officer

INTRODUCING SANDSTORM®

Founded in 1998, Sandstorm® is a Chicago-based digital marketing and UX agency that builds data-driven websites, interactive web applications, and viral marketing campaigns that are as tech-savvy as they are beautiful. Leveraging our user-centered design methodology, our powerful interactive experiences effortlessly guide users through websites and web applications. Through in-depth user research, stakeholder interviews and competitive analysis, we uncover insights that improve the user experience and reveal opportunities for growth.

Working with Sandstorm is like having your own user experience department – fully staffed with experts in brand strategy, content strategy, information architecture, web design, mobile, web development, and website usability.

Our experience includes working with clients such as:
- Northwestern University
- Illinois Institute of Technology
- Loyola University
- Chicago State University
- American Medical Association
- American College of Chest Physicians
- DeVry University
- Certified Commercial Investment Member Institute
- University of Illinois
- Dental Assisting National Board
- College of Neurological Surgeons

OUR USABILITY STUDY APPROACH

Our User-Centered Design Objectives

- Uncover user tasks and goals
- Understand user needs and wants
- Extract information a user requires and in what form they need it
- Improve the usability of the SWAN Enterprise catalog

Proposed Qualitative Usability Study

- Only 5-6 users per user group are necessary to find 80% of the problems (we recommend recruiting 7-9 to ensure 6)
- Obtain observational / behavioral data
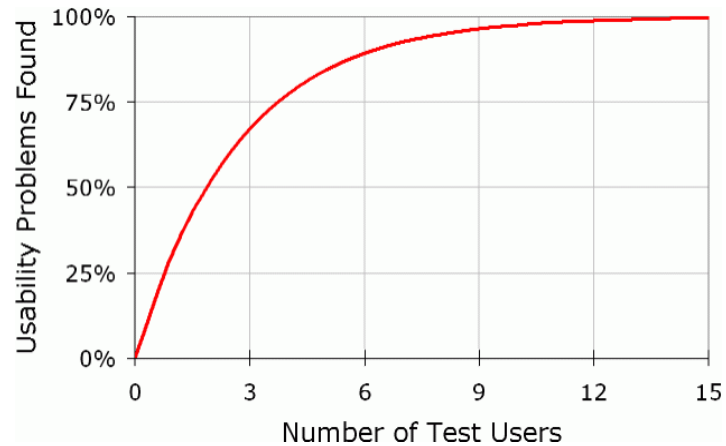
Nielsen, Jakob, and Landauer, Thomas K.: "A mathematical model of the finding of usability problems, "Proceedings of ACM INTERCHI'93 Conference pp. 206-213.

USABILITY REPORT EXAMPLE

Easy-to-interpret usability report including: executive summary, methodology, expected interaction discussion results, task completion results, key findings and recommendations, and additional insights (including quotes from participants).

Example usability report table of contents below:

Table of Contents

CASE STUDY: AMERICAN MEDICAL ASSOCIATION IPAD APP

Sandstorm conducted a usability evaluation with AMA members on a new iPad application. This study was conducted to understand content expectations, perceived value, interactions, potential pitfalls, gain insight on the AMA brand impression, and overall user experience.
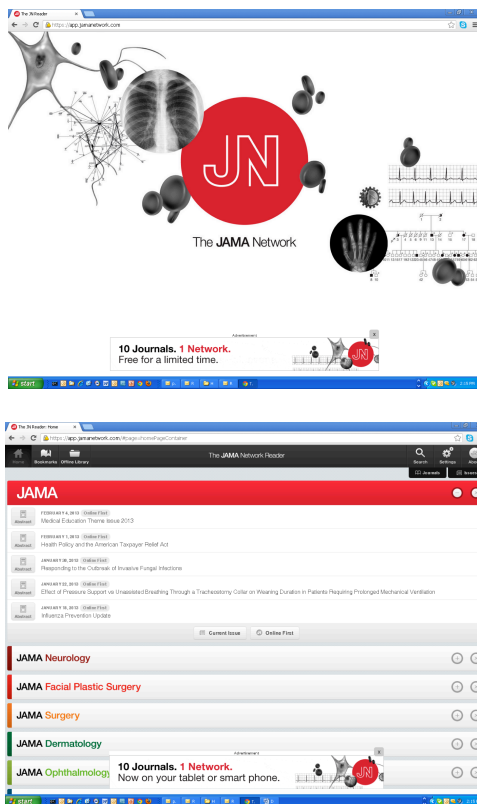
Sandstorm's role for usability testing included:
• Establishing usability goals and objectives
• Writing protocol
• Conducting usability testing in our lab
• Recording user's testing
• Recording user's activities including voice and action
• Analyzing results
• Writing executive summary and key findings
• Developing a detailed report
• Present key findings to client and key stakeholders

Example key finding:
"Search & Explore" in the navigation is too similar to "Interests" page. Users did not understand the difference between the two pages and felt the "Search & Explore" page was redundant.

Recommendation:
Users expected an advanced search on the "Search & Explore" page. Separate search functionality from interest exploration and provide a clear path to allow users to edit their interests.

CASE STUDY: RADIO FLYER

Radio Flyer was heading into the holiday shopping season and wanted to garner more share of spend for their products on their site. Their team turned to Sandstorm to better understand how to convert those grandparents and parents surfing for gift ideas into purchasers. Through in-person usability testing, Sandstorm was able to provide IA and content solutions to create a more direct path to purchase and reduce friction and abandonment on the site.

Sandstorm's role for usability testing included:
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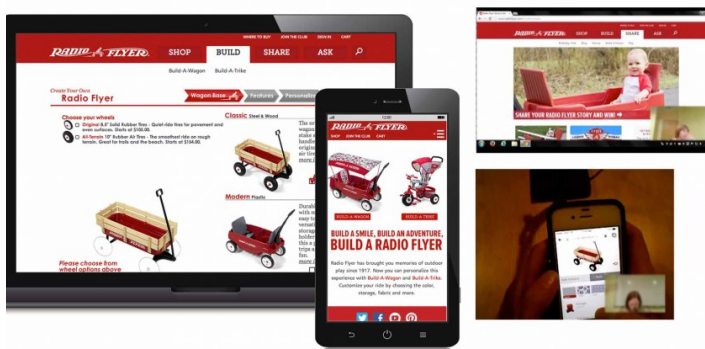
Example key finding:
Several users missed the content on the home page below the slideshow hero because they did not think there was anything else on the page.

Recommendation:
Adjust the design of the home page to provide visual cues that the page extends below the fold.

CASE STUDY: ILLINOIS VEHICLE AUTO INSURANCE

Looking to better serve their target market who was increasingly shopping on their mobile phones, American Access Auto Insurance partnered with Sandstorm to create an application for on-the-go insurance quotes. A substantial portion of the engagement was prototyping and usability testing on the prototype in order to build a user friendly, mobile quoting tool.
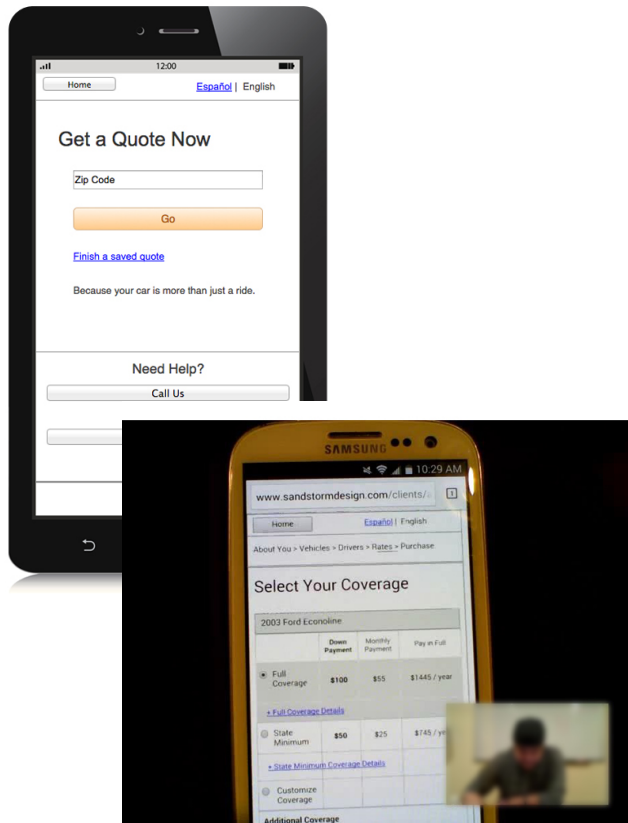
Sandstorm's role for usability testing included:
- Establishing usability goals and objectives
- Writing protocol
- Conducting usability testing in our lab
- Recording user's testing
- Recording user's activities including voice and action
- Analyzing results
- Writing executive summary and key findings
- Developing a detailed report
- Present key findings to client and key stakeholders

Example key finding:
Liability coverage is a more intuitive label for an insurance coverage option than state minimum.

Recommendation:
Update coverage option labels to read liability instead of state minimum.

CASE STUDY: FAST ENTERPRISES

FAST contacted Sandstorm to conduct on-site usability studies on their latest project, implementing their tax software solution for the Idaho State Tax Commission. Sandstorm conducted a series of tests over three months, working in tandem with FAST, to streamline how taxpayers e-file and submit returns on their business and personal taxes.
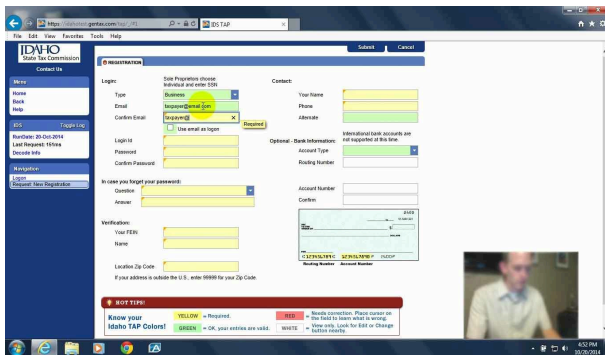
Sandstorm's role for usability testing included:

- Establishing usability goals and objectives
- Writing protocol
- Conducting usability testing on location in Idaho
- Recording user's testing
- Recording user's activities including voice and action
- Analyzing results
- Writing executive summary and key findings
- Developing a detailed report
- Present key findings to client and key stakeholders

Example key finding:

Error messages did not help user identify and correct errors. Messages are too generic and do not provide clear instructions for resolving.

Recommendation:

Provide more specific error messages with guidance on how to resolve the error. Change the invalid field to red and include inline help for each error above or next to the field so it is visible at all times.

CASE STUDY: GETTINGTON

Sandstorm conducted a usability evaluation with frequent Gettington purchasers on the Gettington website and Gettington mobile website to identify and prioritize areas that improve the mobile and tablet user experience.

Sandstorm's role for usability testing included:
- Establishing usability goals and objectives
- Writing protocol
- Recruiting
- Conducting usability testing
- Recording users' testing
- Recording users' activities including voice and action
- Analyzing results
- Writing executive summary and key findings
- Developing a detailed report
- Reviewing key findings with client

Example key finding:
Users did not know what information is required and what is optional in the check out and account creation processes.

Recommendation:
Use a standard method for indicating required fields, like a red asterisk next to the label of each field.

On mobile site, consider separating Media Code Number and Promotional Code into their own step in the payment process called "Coupons or Discounts."
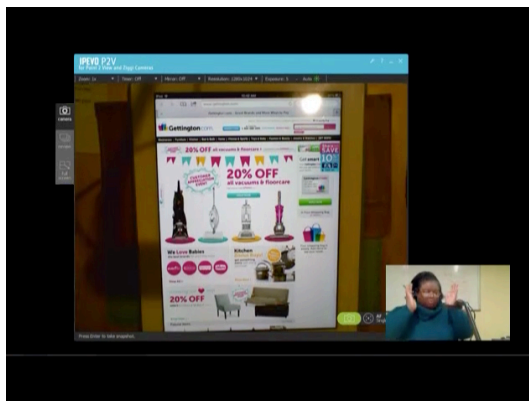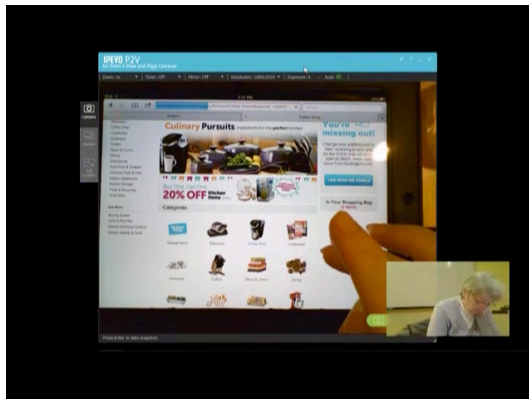
OUR PROPOSED PLAN

Overview

Sandstorm proposes to conduct two days of usability testing on the desktop and tablet experience for consortium patrons on the SWAN Enterprise catalog to ensure the user experience aligns with user needs and software goals.

Weeks 1-2: Plan the research study

- Decide what to test (navigation, terminology, expected interactions, etc.)
- Conduct a task analysis to identify key tasks
- Write tasks to match objectives, write protocols, set up Morae
- SWAN to recruit appropriate 18 users/participants (9 desktop, 9 tablet, each group will consist of 3 participants from each age group 10-17, 18-40, and 40+)

Weeks 3: Conduct the study

- Utilize the think aloud protocol
- Record users' activities including voice and actions

Weeks 4-5: Analyze findings and write report

- Success and error rates
- Satisfaction rating
- Key insights & recommendations
- Write executive summary and research report

Proposed Sandstorm Team

- Michael Hartman, Director of Technology and Usability
- Megan Culligan, Digital Strategist & PM for this project

USABILITY STUDY FOR DESKTOP AND TABLET EXPERIENCES

Usability Study

Starting with real-life scenarios, Sandstorm will observe, record, and take notes while a user performs software tasks using a technique called the think aloud protocol. Other tasks may include navigation content expectations, tree testing, and pre- and post-test discussion questions to get to the core of what works, and what doesn't on the website. The goal is to observe how your site visitors use your site in the real world.

Includes:
- 18 participants onsite at one of the consortium's libraries or in Sandstorm's usability lab
- One test protocol
- Participant scheduling
- Qualitative user research and task-based testing
- Research report with executive summary, key findings, and recommendations
- *Optional:* 1-minute video capture (this video clip highlights key insights, participant quotes, and usability issues) $1,000

Assumptions:
- Client to provide participant contact information (Sandstorm can provide recruiting for an additional fee)
- Client to provide gratuity for participants ($50 per participant is recommended)

Timeline: 5 weeks

Estimate: $24,000 + $1,000 Optional Video + Gratuity

sandstormdesign®
INC

THANK YOU FOR YOUR CONSIDERATION

If you have any questions regarding this proposal, please contact
Laura Luckman Kelber at 773.348.4200 x141 or email llk@sandstormdesign.com.

Sincerely,

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