

Petition Page Usability Test Results

September 4, 2019

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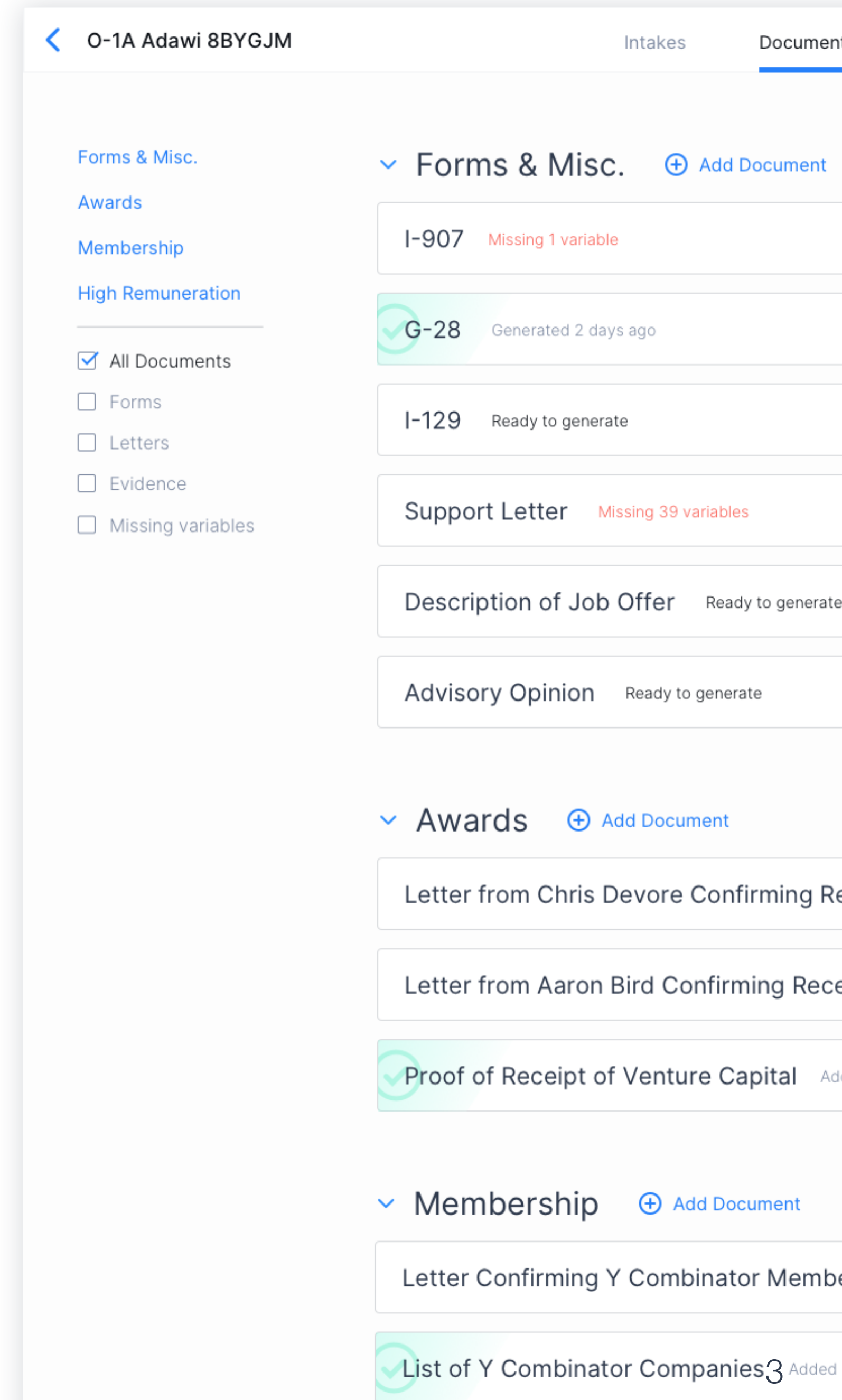
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Summary

To better understand its usability, a new Petition page design was tested. The test involved observing four operators attempt three tasks that a typical operator might perform in everyday use.

In general, the design performed well with a few moderate usability issues.



Strengths

- The new information architecture approach (everything in one place / mirroring ToC) **increases perceived usability** & operator satisfaction.
- “Missing variables” signifiers & filters are helpful.
- Filtering by document type is helpful.
- The taxonomy is mostly correct.
- The visual design is aesthetically pleasing.

Weaknesses

- Finding & viewing a just-added document is too difficult.
- Non-required variables should default to “N/A” in a data polish view (or whatever that variable’s empty state should export as).
- The ‘generated’ signifier is confusing or misleading.
- File names need to be visible on each document card.

Finding & viewing just-added docs

MODERATE ISSUE

While most participants easily added a document to a petition, all participants struggled to find the document after it had been added.

Consider adding a View button to the Document Added alert & a stronger signifier for just-added document cards.



I-907 Form successfully generated



Non-required vars should default to N/A

MODERATE ISSUE

Most participants expressed a strong desire for “*forms to be properly filled out.*” Defaulting non-required variables (e.g. “Beneficiary Middle Name”) to their export value (e.g. “N/A”) will save operators time and tedious effort.

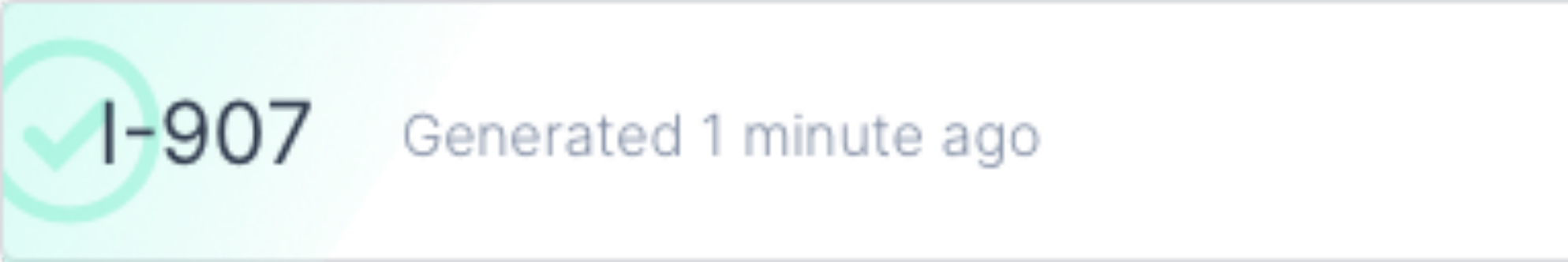
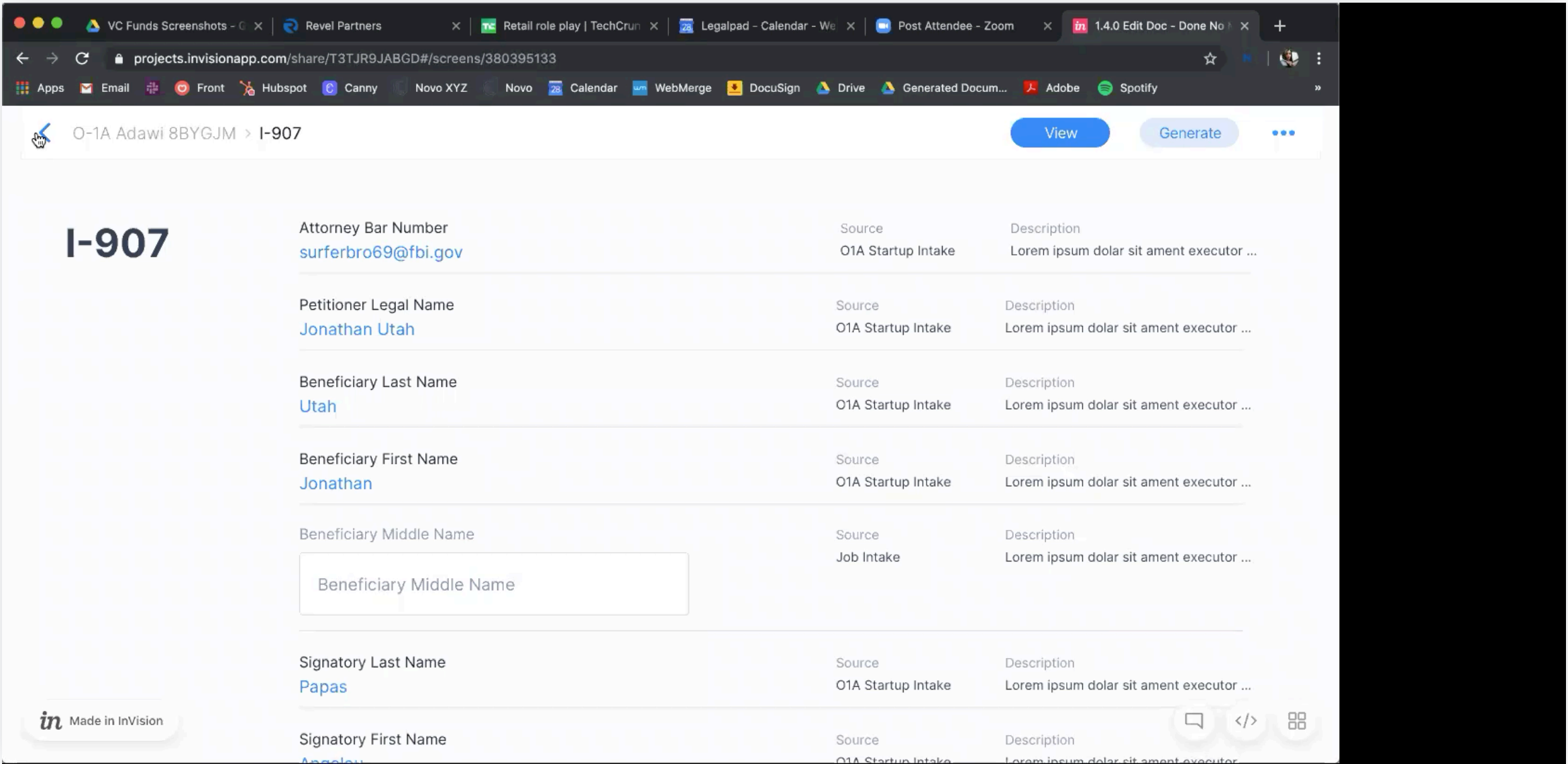
“If we can put None or N/A... we like that.”

“It really should be N/A, probably.”

Generated signifier is confusing

MODERATE ISSUE

Most participants were confused or misled by the “Generated” signifier.



Document cards need file names

MINOR ISSUE

Several participants wanted to see a document's file name on the Document Card element.

Letter Confirming Beneficiary's High Remuneration
at Lila, Inc.

Missing 4 variables

Polish

Generate

NO



Letter Confirming Beneficiary's High
Remuneration at Lila, Inc.

[Draft] G-28 [- Amr Adawi].pdf

Generated 3 days ago



MAYBE

Issue Ratings Explained

Unusable

The user is not able to or will not want to use a particular part of the product because of the way that the product has been designed and implemented.

Severe

The user will probably use or attempt to use the product here, but will be severely limited in their ability to do so.

Moderate

The user will be able to use the product in most cases, but will have to undertake some moderate effort in getting around the problem.

Minor

The problem occurs only intermittently, can be circumvented easily, or is dependent on a standard that is outside the product's boundaries.

Key Insights

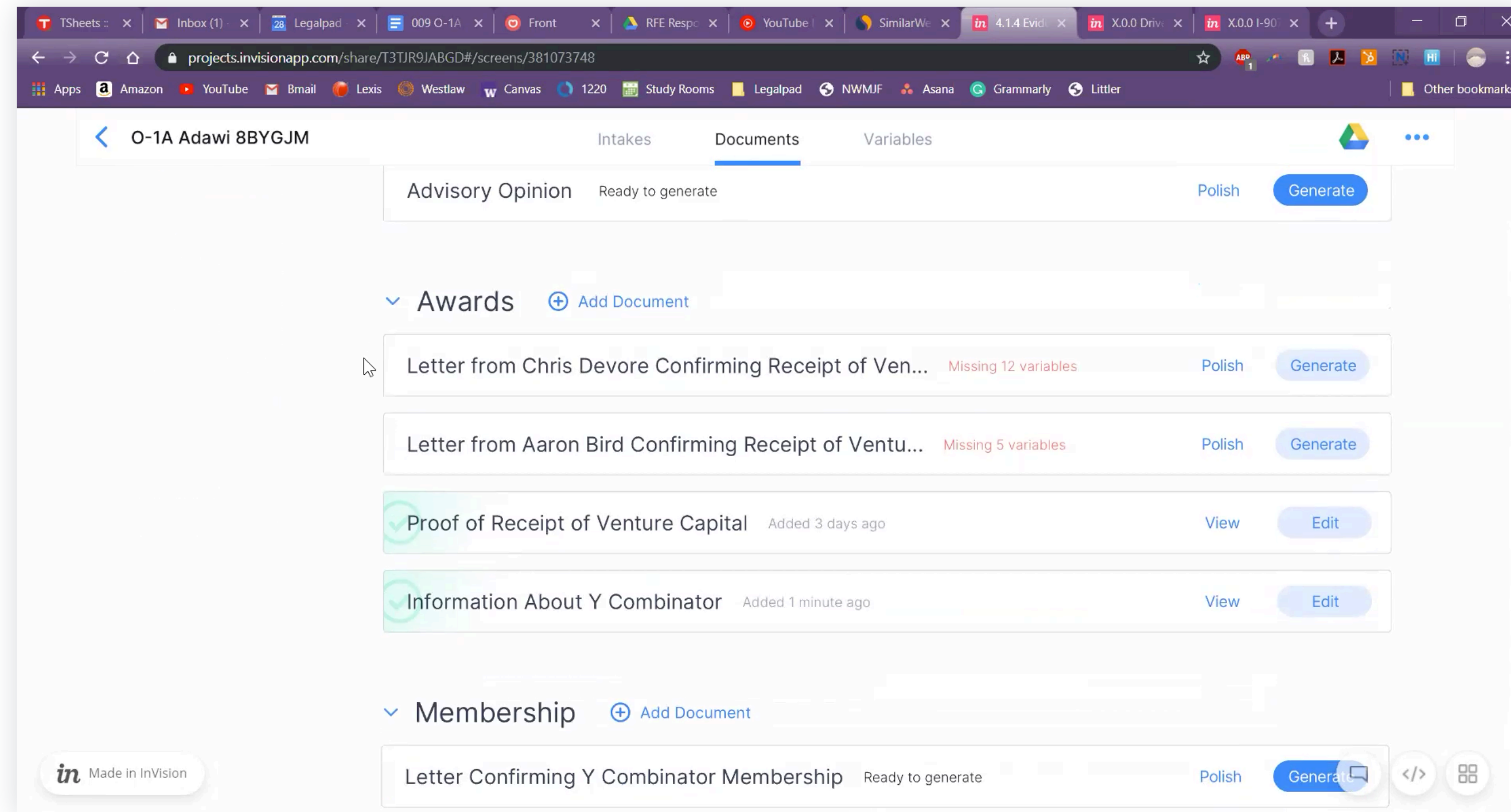
- Operators want **guidance** on where to focus their efforts.
- The petition flow needs to be **flexible**.
- Operators need more **visibility** into the status of a petition's intakes & letters.

Key Insights - Guidance

- Sharing documents should be initially scoped to a list of people associated with the petition.
- Clearly indicate which criteria a petition is applying for **and which it isn't**.
- Indicate the strength of each criteria section (see next slide).
- Drive folder structure should be created as a result of completing the Create Petition flow.

Key Insights - Guidance

Indicate the strength of each criteria section.



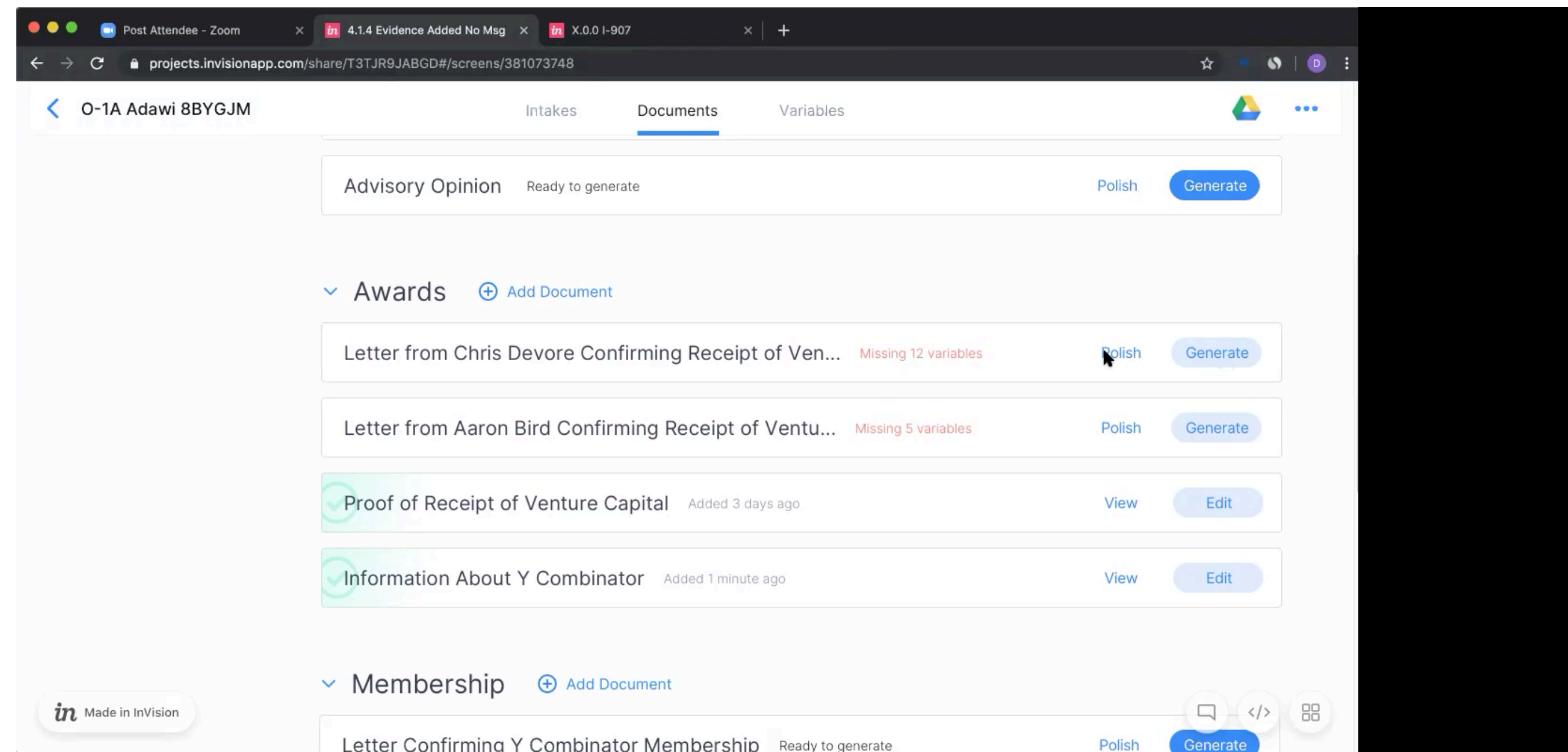
Key Insights - Flexible

- Operators need to add petition criteria & entities (e.g. membership at an accelerator & evidence supporting it) at any point in the Petition flow.
- Operators need to generate & share a document even if it's missing variables (see next slide).
- Operators need to customize document titles used in the Table of Contents.

“We're always messing with these letters. Always.”

Key Insights - Flexible

Generating with missing variables is useful & necessary



Key Insights - Visibility

Operators need more visibility into the status of certain petition elements, especially intakes and letters.

“I'm not sure if this is signed or not.”

“I'm never sure if a client has filled out the forms [intakes] or not.”

“Right now, it's three or four different spots we're checking. Email, the Google Drive, the other Google Drive, Novo, Hubspot.”

Next Steps

- Address usability issues (started)
- Get operator feedback on improved design
- Assess viability & priority with Dev team (inception meeting)

On Deck

Petition Page

**Intake Submission
Notifications**

In Progress

**Webmerge / Drive
integration**

Data Polish

Methodology

Participants were observed via Zoom video call attempting tasks on a desktop device using a [clickable prototype](#).

The limitations inherent to this style of testing (most notably click latency, missing hover & press states, and non-accessible pages) were taken into account when synthesizing these results.

Methodology - Tasks

1. See if you can open this petition's Drive folder from the Petition screen.
2. Generate the I-907 and make sure it generated correctly.
3. Add evidence to support an Award from Y-Combinator from the Wall Street Journal.