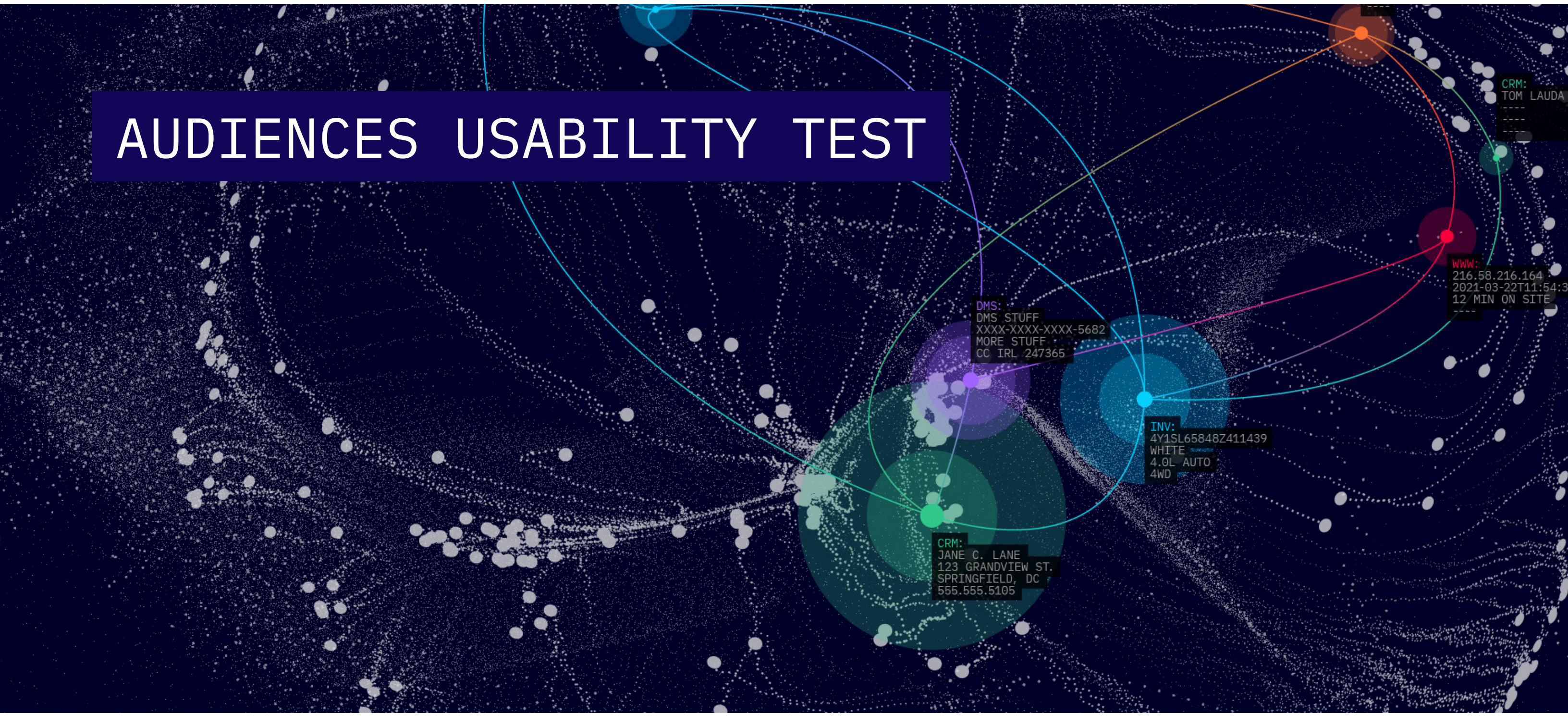
AUDIENCES USABILITY TEST



Jarrod Murray / UX Researcher / February 1, 2022

BLUF (BOTTOM LINE UP FRONT)

Summary:

I invited four Client Success Reps and one Digital Specialist to participate in a low fidelity usability session to test two workflows... opening Audiences and adjusting Audience sizes.

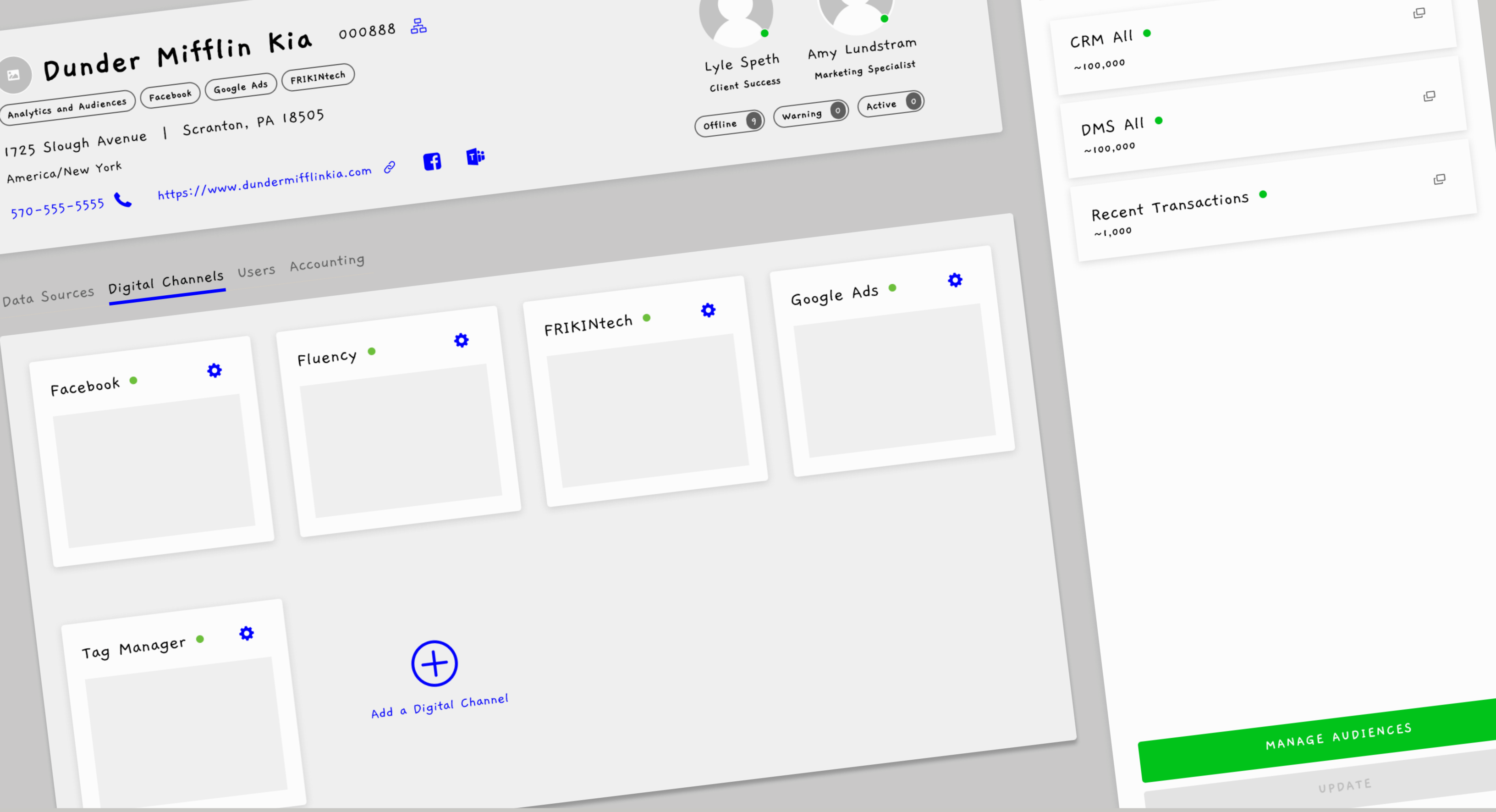
These users had never seen or interacted with the Garage Tool before... this was done intentionally to test the wayfinding/navigation.

Findings

- Most users first click was on the DD Products... which are not clickable
- 4 out of 5 successfully completed both tasks without assistance
- When updating the Audience Parameters, all 5 knew the size increase
- 4 out of 4 knew the updates would likely be applied tomorrow (one wasn't asked)
- Most agreed this would be done by a Marketing Specialist... or at the very least at their recommendation
- There wasn't much agreement on when this workflow would be performed
- When asked to complete both tasks again... one user completed the entire task in 0:16... suggesting good learnability of the system

Recommendations

- The Card / Menu should be more obvious
- Need to allow users to manipulate Audiences on an Org level... not just at a Digital Channel level
- Update to High Fidelity to solve for Org Level changes and re-test with three users



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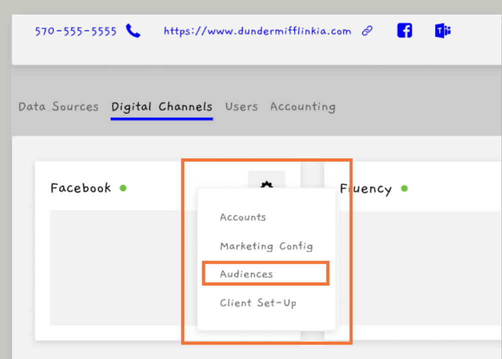
TASK #1

Your Client, Dunder Mifflin Kia has a question about their Facebook Audiences. You're on the Organizations Tab in the Garage Tool...how might you view their Facebook audiences?

Steps to successfully complete this task:

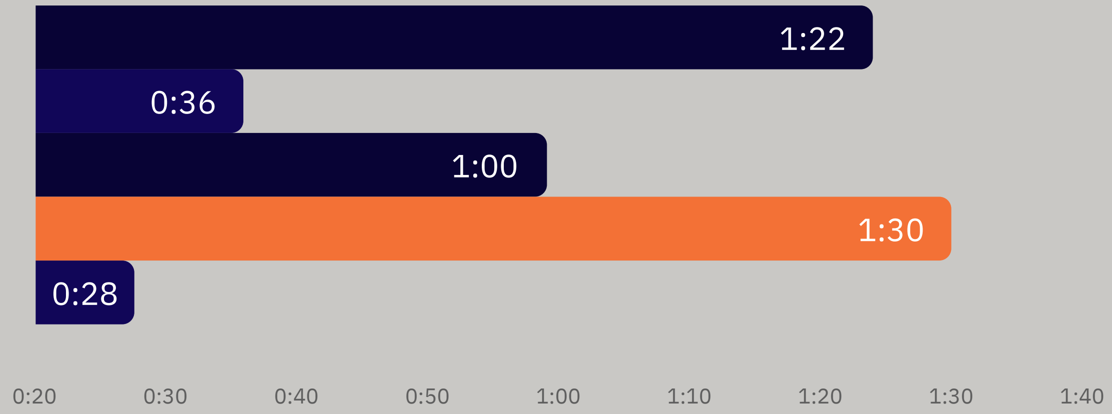
- Click "Dunder Mifflin Kia" in the org table

- Click on the "Digital Channels" tab



- Open the Facebook Menu
- Select "Audiences" from the dropdown

TIME ON TASK



Participant 1

- First instinct was to click “Audiences & Analytics” and “Facebook” in the DD Products
- Second instinct was to look under DMS

Participant 2

- Navigated right to the correct spot... but expected to click on the card and not the Settings Icon

Participant 3

- Attempted to click “Facebook” in DD Products
- Navigated correctly to the Facebook card... had to click around to find the dropdown menu

Participant 4

- Attempted to click “Facebook” in DD Products
- Next instinct was to look under CRM
- Stopped looking...had to be told to click on “Digital Channels”
- Once there, found the Audiences

Participant 5

- Was looking for an “Audiences” section but found it the fastest of all participants

TASK #1 QUESTIONS

Did that seem like a logical place to find that information?

- Yeah, I mean considering it's the first time that I've looked at it, I reserve judgment as far as how easy it is to find certain things, because upon an introduction, if you know... where it is at that point, it's just going to become easier. I mean, my first instinct since it was Facebook, was to try to get there through Facebook instead of Digital Channels, but once I figured out it was under Digital Channels, it was fine.
- Knowing that it would be for me, then yes, I would say that would be in the settings because that would be the environment like managing the account.

  I think this all seems right. It's a, maybe it's the icon that I think that my brain stops on is that I sort of like pause right to go click that icon like would that be settings and it makes sense after I get all the way through.

  But maybe if that was even like, just like a little down arrow or you know it's something that is a little bit more of like a generic feel maybe? But yeah, I definitely... all that seems right at the end.
- Absolutely.
- Logical but not as intuitive, so your eyes... first thing will be drawn to 'Analytics and Audiences' and 'Facebook' as potential links. But clearly they are not. So yeah, I was definitely drawn to here other than the tabs.
- Under a channel first, which probably makes sense. Yeah, this is just what they're signed up for. Which I get now (the DD Products badges).

  Yeah, I guess yeah. 'Digital Channels' I guess they only have Facebook...they must not have Google ads, oh they do. It's over here.

  Sure, yeah, either that way or you can view all the audiences and then determine from there.

1 being easy...10 being difficult... how would you rate the level of difficulty or ease?

- 2. Only because I wasn't rewarded with my initial instinct.
- You said 10 'being difficult'? I would rate that like a 3.
- I'm gonna say a 4.
- I mean, that's 3 maybe tops... like once you point out that Digital Channels thing was there but pretty simple.
- It was fairly easy when you know where to go. Gosh, I don't know 5.

What is your opinion on the labels and terminology used?

- Yeah, yeah, so I mean all of this on the right hand side. Looks good. That'll make sense as far as labels there. It just wasn't... I was looking for audiences and there wasn't anything immediately labeled audiences here. Uh, it just threw me a little bit.
- I'm gonna have to say it's correct. I'm very new to the marketing terminology... all of this is still very new to me and I was able to move through it. Obviously it's a little smaller because I'm sure of how we're trying to go through this, but I think it's fine.
- That makes perfect sense.
- There wasn't terminology. Well, I would say is that people might mistake these for links. Otherwise I think it's good.
- I don't know if I would call this 'Digital Channels'... I guess. Now looking what's in here like Facebook is a channel...Fluency... Google is a channel, but these are really channels. 'Digital'... maybe like something in general like 'Tools' or 'Digital' just Digital. I don't know. Because two of these are channels and...that's a tool...and that's a partner... and that's the tool.

TASK #1 QUESTIONS

Is there any information missing here?

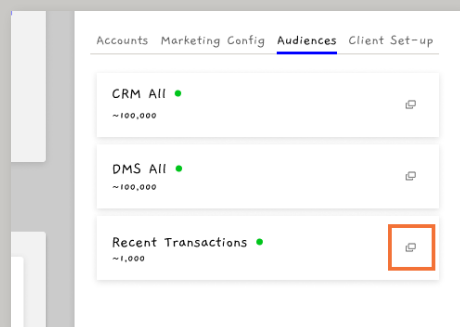
- Yeah, yeah, so I mean all of this on the right hand side. Looks good. That'll make sense as far as labels there. It just wasn't... I was looking for Audiences and there wasn't anything immediately labeled Audiences here. Uh, it just threw me a little bit.
- No.
- No, not that I know of.
- Not that I'm aware of.
- This current setup only allows you to look at Audiences like you have... you don't even get to see the Mile High view. You have to immediately....it's like very blurry, Mile High. And then you have to dive into the specific and you can't come out and see things. From a holistic standpoint.

TASK #2

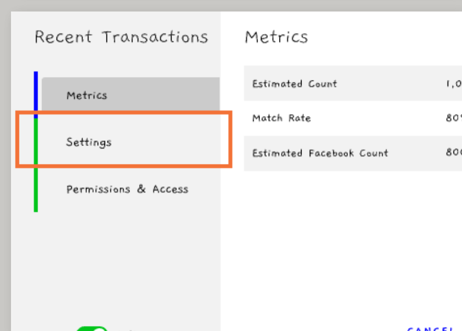
TASK #2

Dunder Mifflin Kia would like their “Recent Transactions” audience to be larger...how might you increase the size of an audience?

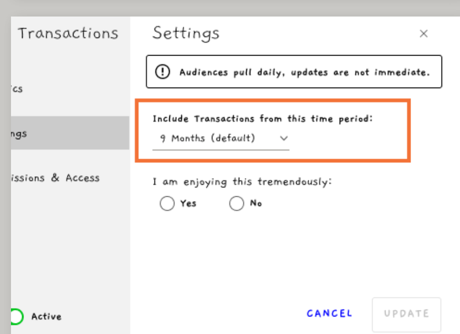
Steps to successfully complete this task:



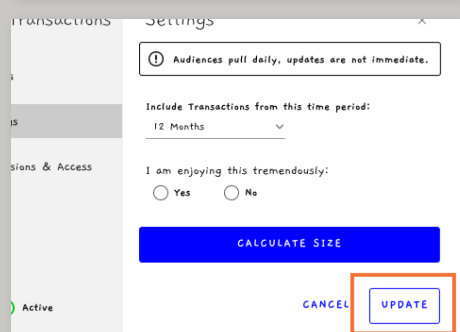
- Open the Recent Transactions Audience



- Open the Settings Tab

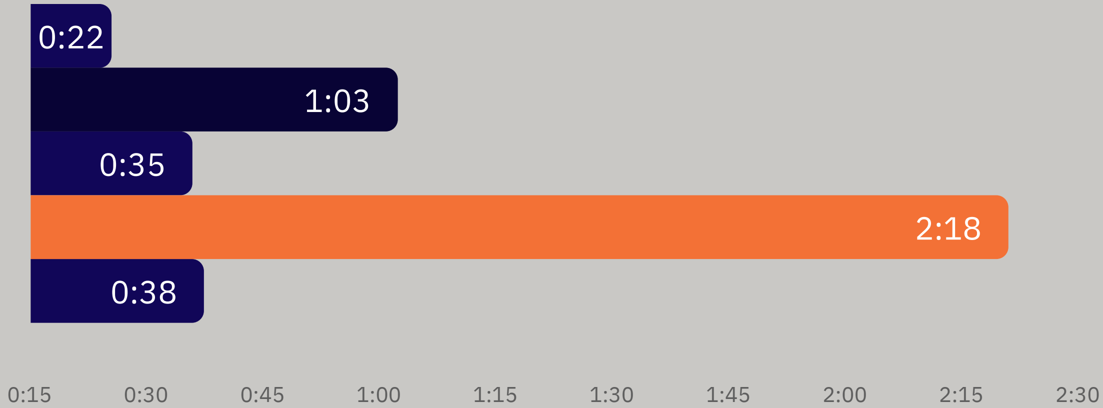


- Increase the time period



- Save the Changes

TIME ON TASK



Participant 1

- Claims this would only be performed by Digital Specialists
- Once prodded along... completed with ease

Participant 2

- First instinct was to click "Manage Audiences" button
- Second instinct was the correct workflow

Participant 3

- Started the workflow from the Organizations Tab (increasing her time by 0:14)

Participant 4

- Started the workflow from the Organizations Tab... losing the context of it being a Facebook Audience.
- Thought "Users" or "Accounting" would be the place to find "Recent Transactions" information
- Once re-directed to Facebook Audiences... completed the task in 0:41

Participant 5

- Completed the workflow with no issues

What was the outcome of your modifications?

- Yeah **jumped it up to I think it's 1,300**
- **300 more** recent transactions.
- We increased how far back they're going on their DMS data to include more recent transactions. (Q: Do you remember what that did to the size of the audience?) **It added 300**.
- To increase the size of the recent transactions audience. (Q: Do you know by how much you increased it?) Not that can see here. (Then clicks the Calculate Size button) **Plus 300**.
- So this should have **increased to 1,300**.

  And it excludes obviously more people. What would be also interesting potentially is you have to click into a channel to get the audience, and that's obviously the match rate after that audience. But it would be interesting potentially to show... even if it's in this function... or you have like a tool here that's "Audiences" and then you can have "Audience in the database", "Audience in Google", and "Audience in Facebook", IE, Bing, display. You know all the different channels may be queued up... or a way to see that "hey, this is 1,300 people... it's only matching 1,300 people, but in reality like Recent Transactions for the last 12 months is 2,000 people and we're only matching 1,300". So there's a way to potentially raise like a red flag with audience health.

When can you expect your updates to take affect?

- **Tomorrow**.
- Audiences pulled daily updates or not immediate... I would say **overnight**.
- Daily, so maybe **tomorrow**.
- So if I change this you know you maybe have to do it tonight. It would take like couple of day or two. Maybe it would show up **tomorrow**. Might be the day after.

TASK #2 QUESTIONS

Who might be tasked with this workflow?

- **Digital Specialist 100%**... Client Success would never want to touch that.
- My first thought would be the **Digital Marketing Specialist**, but **potentially Client Success**.
- Lynn, I don't know. (Q: Do you ever see yourself coming in here and changing the size of audiences?) Cool, oh that I'm so sorry. Yes **we (Client Success) would do that** (Q: Anybody else?) **Marketing**.
- I could see it going to **Marketing**, **Digital Specialists**, or Client Success.
- This would probably be a **Digital Specialist** or if this is like someone who's an Agency customer then this **could be like a Client Success role**... it would kind of depend, but probably someone with marketing expertise maybe. Maybe one of those two wouldn't be anyone in creative or anything like that.

  I also wonder... if Dunder Mifflin Kia suggested that they wanted to change this, like we had discussed that... how does this tool prompt me to do that without Dunder Mifflin Kia telling me that they wanted to do that? You know, is there a way to highlight a recommendation? Without the client having to say something or us notice it.

TASK #2 QUESTIONS

When might you use this feature?

- Client Success would not use this feature other than to pass along the request to the Digital Specialist that the client need it. Because increasing audiences and that sort of thing that's going to be done at the clients request, **but based upon the Digital Specialist recommendations**. Ultimately the Digital Specialist would look at it and say "yes, that makes sense" or "no, that doesn't make sense and why", and we would simply communicate that to the client. So the Digital Specialist would ultimately make that decision based upon the data at hand.
- Now would actually be a time that we wanna use this feature. Where dealers don't have inventory. They really need to... if they're spending their marketing dollars, they really need to spend their marketing dollars on people that they know have some sort of loyalty or they know, have some sort of interest in what they're doing, so **I guess when the metrics would tell me we need to do something**, or when the dealer specifically brings up an environment change or an operational change where they need that extra push.
- Like if a client is looking to increase sales... it's just gonna help drive audiences down to a more... like it's gonna help funnel them better so you could choose less recent transactions or more. But I think it's just going to give us a better understanding of who our clients' clients are.
- Prior to marketing meetings with customers or even dashboard maybe dashboard, but certainly before client meetings, marketing meetings.
- You would use this feature... definitely **when a client is newly signing up**. And then you would use this feature after that... **I would say on a quarterly basis**... unless something changed or newly developed.

How can this experience be improved?

- This one was great... made sense. **I found it exactly where I thought I would find it**.
- Yeah, that's a hard one for me to answer, because I feel like I don't know enough to say that I probably wouldn't... I understand the logic behind what I'm doing, but I don't understand... I didn't understand how I got there while I was getting there.

  As easy as the other task, that was a lot more like OK boom boom... this makes sense... but this one might also be because I wouldn't be able to define Recent Transactions as far as manipulation goes.
- I think it's great. I don't think there's... **that was easy**.

  I mean, I think it's very easy to navigate. The only thing... like I said earlier, is I would maybe move, or make this little wheel more obvious that it is an actual menu. But other than that is very user friendly.
- When you said 'Recent Transactions', there was no indication to me that that would be located in Facebook. I had no way of that... that to me says 'Accounting' or 'Users'. It doesn't tell me Facebook. But once you told me that it was at Facebook Audience thing, **it was fairly intuitive**. I love everything that we looked at here today.
- You know it could be annoying if I decided I wanna up my recent transactions size on Facebook and I also want to do it on Google... I have to go and do it twice. I don't know if that also eludes the need for a current "Audience" spot where you can see everything together.

  Or is it a way to like say Settings make this change across all platforms or channels or something? Or just Facebook?

What did you like the most?

- Honestly, it’s the silliest thing, but I love this little thing here ‘I am enjoying this tremendously’ just because it made me laugh. And sometimes when you’re trying to work and do something, it’s a great way to kind of break up what you’re doing. Sometimes you just need to smile and I didn’t even know I needed a smile until I saw that and it made me laugh so.
- I love automation. I love the efficiency of what’s behind this tool. I would say that this falls very in line with the dashboard and sort of what we’re helping the dealerships do and improve their operations. Like I said, they’re efficiency...what’re they doing...how are they getting from point A to C in the best way possible. And I feel like having all of this information laid out in a user-friendly way, whether that be internal or external, is one of the smartest things we could possibly do... so I love it. I’m behind it, fully supportive of it. I think it’s great.
- The ability to go in and change the audiences and how quick it was and how easy... seamless.
- The most I think... the UI is pretty good. I’d say the UI is pretty good.
- But the niftiest thing was actually probably that preview. I like being able to see what’s going to happen before I do it...to see if that needed to change.

What did you like the least?

- I'm not going to say that I liked it the least... but I didn't like that my first instinct wasn't rewarded for when I went to go complete the first one. It would have been nice to have had some sort of redirect I guess. Because depending on what your position is, if you're in theory not gonna train people off the bat to find things... where they're at, then you would kind of take a look and be like OK, well, from another point of view, where else might somebody look? Well, since somebody might look over here, let's go ahead and just do a quick hyperlink or whatever it to bounce them over to where it would actually live, or just something along those lines.
- I like the look. I like the style the light background, the colors that were picked up. The only thing I would say if this is going external...personal opinion I don't... I know you said it will hurt your feelings but I don't wanna hurt your feelings. I hate the font. The font for me feels like I made this and it doesn't feel like something Driven Data would be going and presenting to a marketing agency with 500 rooftops.
- Trying to find the menu.
- I don't see why this is here, unless it's just letting you know immediately what is involved under the account.

  (Those are the DD Products that they have turned on in HubSpot. So this will allow you to know that this is an Analytics and Audience customer, who is also advertising on Facebook, Google Ads and has FRIKINtech. So those are not designed to be clickable, they're there to notify you what this client is signed up for)

  Gotcha, so with that context then yeah that makes complete sense.
- This current setup only allows you to look at Audiences... you don't even get to see the Mile High view. You have to immediately... it's like very blurry, Mile High and then you have to dive into the specific and you can't come out and see things from a holistic standpoint.

How would you describe the overall experience?

- It was **good**, yeah.
- I would say **easy**... the most important thing that I would note is that again, I'm new. All of this terminology and language is new for me... and I would say the most important thing is that I didn't know necessarily where I was going on the second task, but I got there and so that's something to know that I still got there. I was still able to find it, so the verbiage is correct. And if I had more experience behind terminology or really knowing what I'm doing, would I have feedback on that? Maybe not... so even though some of my feedback is well, "I'm not sure I know what all of this means". I was still able to complete the task and and get to the end.
- **Smooth**... for sure...I mean user friendly, easy, lots of information right at your fingertips.
- I think it was **good**. There's always some hesitation or some learning curve and jumping into a new UI and trying to navigate it, but this wasn't bad, and now I know that these aren't active. I'm less bothered by the fact that they stay lit up, so like that's not an issue, says some of my issues. Once context was given, became non issues... so I think it's good.
- Yeah, I think it was **fine**. Yeah, I don't... I guess I don't have a ton of feedback for the overall experience. I think it **could be improved**.

Do you think that you would be making tweaks to audiences at the larger level or at more of the Digital Channel level?

- I think there'll be a combination of both. I think when a client first signs up... we may have to adjust all of their stuff to from 9 to 12 months, or I think you're going to do a combination of both, and I think even if you're only doing per channel changes, it's good to see how that then that Channel size compares to another channel or compares to the overall match rate that we're getting. 'Hey, for Recent Transactions we're getting a 80% match rate on Google or 80% match rate on Facebook... 50% on Google... but CRM is 50 and 10 like whoa! What happened there?'

  I think being able to look at it comparatively and specifically would be the best. Just because you're making a change in one space, Recent Transactions on Facebook...it may inform your decision to go do another thing by seeing all of them together.

- I like what they're signed up for. It would be interesting potentially to be able to click on each of these and they go to a HubSpot page or some way that you can find out that they're paying $500 for... what are they paying for each of these? Or do they all link? Is there a button to linked to this deal, or something? Or how much are they paying because trying to find out what everyone's deal is for all these things is a nightmare.

Why do you need to see that?

- When they try and cancel...maybe there's a button here for creative or Driven Data creative... OK, what are they paying for? I feel like when there is an issue with the client, or they're adding something, or what type of package are they on... I feel like there's a lot of questions that come up around that That information could be organized better and give us confidence that we're looking at the right thing.
- Dunder Mifflin Kia tries to cancel...how much are they paying for FRIKINtech? We struggling through like an Excel document...that may or may not be accurate... like it's kind of iffy. What type of package are they on? Hey, if they start spending $10,500 and that's over the $10,000 threshold? Are they on a package? What type of product are they signed up for... that I think would be more helpful here.
- So then all of their dashboard. Where's the link to their dashboard here? I think if you've got your icons for like Facebook, and Teams, Google, I would assume Fluency... maybe also something like quickview at their dashboard... if we're going to be presenting, just a link out.