# Jim Hall

## Consumer Insights and Experience Design Leader

Work Samples

# Test Plan

# Test Plan Example

In my years of experience I found that keeping the Test Plan as simple as possible allows for my stakeholders to easily scan and discuss the upcoming test.

My stakeholders are my primary source of information with regard the questions or topics that need to be discovered.

## Quill Customer Study – Ink and Toner

**Purpose**
To observe and gather direct feedback from customers who are currently purchasing Ink and Toner in order to better understand how our customers find and purchase these products. Feedback received will help us to enhance the customer experience on Quill.com.

**Process / Methodology**
In-person interviews will be conducted with Quill customers. A team of 2 -3 Quill employees will attend each session. During the session the customer will be asked to discuss their experience with Quill.com. We will observe as they place an order on Quill.com. Specific questions around certain topics will also be asked during the course of each session (see below). The customer will be asked to give open and honest feedback on all aspects of Quill. It is very important that the customer does not feel they are being tested and rather we are gathering insights to design a better experience. Additional follow up questions can be asked of the customer at any time throughout the interview.

The facilitator (Usability) is the primary point of interaction with the customer making sure that the interview is flowing correctly and that the appropriate questions are being asked and answered. The additional team members will be the primary note takers capturing all important aspects of the interviews such as observed pain points, validations of existing design and navigation path through the site.

After all interviews are complete the team will create and socialize a report out of the key findings and recommendations. These recommendations will be used by various business teams to help create and prioritize their roadmaps.

**Users**
Active customers who have purchased Ink and Toner in the past 4 months

**Date(s)**
11/28 – 12/5

Contextual Interviews

# Notes to Interpretation Sessions

The raw notes taken by pen and pencil during the interviews are reviewed and interpreted by the team into a master spreadsheet that is used as a baseline throughout the project.

| User | Note |
|------|------|
| U01 | Supervisors 8; 6 Managed & 2 Unmanaged - Furniture Specialists |
| U01 | Field leads come from acct mangers |
| U01 | work with 9-13 acct mgr. per specialist |
| U01 | communication with many groups |
| U01 | product support for furniture - this is abnormal |
| U01 | field leads come from CR & customers |
| U01 | only speaks to customer if needed - primarily works with specialist |
| U01 | reach out to supervisor if needed not customer |
| U01 | account management puts leads into dash |
| U01 | admin pulls leads out of dash (Task) and emails to the specialists (Outlook) |
| U01 | furniture looks at ent level data - need complete customer picture (not desk level) |
| U01 | reviews lead list periodically |
| U01 | look at notes in DASH - very important for them to know who the specialist is - only at ent level pertaining to Furn - not desk level |
| U01 | primary buyer of furniture - not the entire company structure needed |
| U01 | ability to filter notes - today it's all the notes displayed |
| U01 | see sales by all categories - sorted by furn (most important piece) |
| U01 | helps with the pricing discussion to determine what the total spend would be |
| U01 | ability to see admin tasks (furn) - sortable |
| U01 | ability to see status of tasks - progress/history |
| U01 | ability to see alert that a task was completed |
| U01 | need to copy & paste acct # from DASH to OES |
| U01 | OES is used when entering or viewing quotes - see what customer has spent on orders (research) |
| U01 | reviews pipeline for every specialist (access db) - performance issues today |
| U01 | pipeline is key for specialist - in there all day long - held accountable for the number of plays |
| U01 | OIM printout - questions about invoices, customer status, order need to research what's the status |
| U01 | OIM used to increase Credit limit |
| U01 | OIM - notes from other dept for drop ship orders - need to follow up with the drop ship team that does not use DASH |
| U01 | Lattice report is reviewed - fed by DASH - output are talking points based on specific cat or item |
| U01 | Lattice includes notes in addition to DASH, Pipeline, OIM, OES - but not connected; all are manually entered |
| U01 | Talk time report on connect point - always reviewing this |
| U01 | NICE - phone recording system - reviews daily for anything for her team |
| U01 | NICE - reviews call over 3 minutes |
| U01 | NICE - Uses for team management/team building/coaching |
| U01 | NICE - Uses to resolve customer issues |
| U01 | NICE - copy & paste phone number into DASH to look up customer information when resolving issues |
| U03 | they process the work from AM's and specialists |
| U03 | do pricing, reporting and OES updates |
| U03 | get most of their tasks out of DASH |
| U03 | add and remove accounts as needed |
| U03 | Will enter orders for special orders such as large value, high price or specialty furniture |
| U03 | Specialists look at the DASK tasks first to prioritize their day |
| U03 | Coordinators look at their email first then look to DASH tasks |
| U03 | Scans the task list reading for high priority tasks such as Quill Brew or Pricing |
| U03 | Some tasks are emailed directly to the coordinator from the AM after being pulled out of DASH |
| U03 | Some email tasks require approval by going into OE |
| U03 | Needs to find all their tasks by AM.  Looks at tasks under each AM |
| U03 | Needs a single place to see all their tasks |
| U03 | Needs to be able to see any tasks for Admins that they are the back up for |
| U03 | DASH will crash if you try to view all the closed tasks |
| U03 | All tasks are dependent on the AM filling out the right DASH template completely.  Sometimes they are incomplete |
| U03 | Need to look at the mainly the Enterprise details in order to update any price details and need to attach pricing agreements |
| U03 | Work or research starts at the account level and need to find and copy the account # to enter into other systems |
| U03 | Have to review DASH every few minutes for any new tasks.  No alerts are sent |
| U03 | Some will bulk copy DASH tasks into an email and close out the task in DASH |
| U03 | To review closed tasks need to first look up the Enterprise b/c system pull ALL closed tasks |
| U03 | Any rush tasks are also emailed directly |
| U03 | Would like to visually see what tasks are rush |
| U03 | Received a task in DASH to update a buyer.  Had to add the buyer in OE. Then needed to go into OIM to click a button that generates an email to the buyer |

# Contextual Interviews - Report Outs

As with the Test Plan I found more success by keeping the report outs as simple as possible.

A 1-page summary has been most effective as the tool to start the conversation around what the customers job story is and what a potential solution may look like.

Depending on the audience the report out may need to be more visual and therefore a powerpoint presentation needs to be created.



**Shared Cart Study – Summary**
May 22nd – June 6th

**Goals and Methodology**
- Gather feedback directly from customers on:
  - Awareness and marketing of Shared Cart (SC).
  - Shared Cart (SC) set up process
  - Overall usage and reaction to Shared Cart (SC).
- 12 Contextual Interviews were conducted with local Quill customers (in-person)
  - 9 customers were visited (5 existing SC users; 4 NEW SC users)
  - 4 of the customers included a SC Admin and a SC User

**Awareness Findings**
- Existing Shared Cart users could not remember how they were made aware.
- Most indicated that they saw something on the site but were not sure.
- For NEW customers when asked where they would go only 2 saw and clicked from header
- **Recommendations**:
  - Create on-site awareness strategy and standards (in process)

**Set Up Findings**
- Majority of the SC users either indicated or were observed to have issues with the set up email.
- The link to access and set up the SC was not clear.
- 2 users clicked to set up a new Quill account from the footer in the email.
- Majority of customers were confused by the requirement to name the SC.
- Privacy settings were understood by most customers.
- Larger customers asked about importing a list of SC user email addresses
- **Recommendations**:
  - Make the set-up SC option more prominent in the email.
  - Change the cart name to be an optional field
  - Allow customers to import email address from a file or click and drag from email client

**Usage and Reaction Findings**
- All customers indicated confusion by the SC Users regarding which 'Add to Cart' to use.
- SC Admins were not seeing items because SC Users added items to Cart rather than the SC.
- Many SC Admins asked for the SC Users to only see 'Add to Shared Cart'.
- There was significant confusion by the Admin when they saw the 'Proceed to Checkout' button rather than the 'Move Items to Shared Cart' button
- 2 Customers asked to be able to set up multiple SC with different Shipping Addresses.
- There was confusion when setting up Shipping and Billing addresses as new Quill customers.
- Majority of the SC Admins missed the on-screen notification of items
- All customers wanted some sort of email notification of items added to cart
- 2 users had Purchasing Manager set up but are not currently using
- **Recommendations**:
  - Create a stronger visualization showing the difference between Cart and SC
  - Allow SC Admins to set user accounts as Shared Cart Only accounts
  - Always require the Admin to 'Move Items to Shared Cart'
  - Create the ability to set up multiple SCs with different shipping addresses
  - Enhance the design interaction for NEW SC users setting up their own SC
  - Add email notifications to Admin of items added to SC
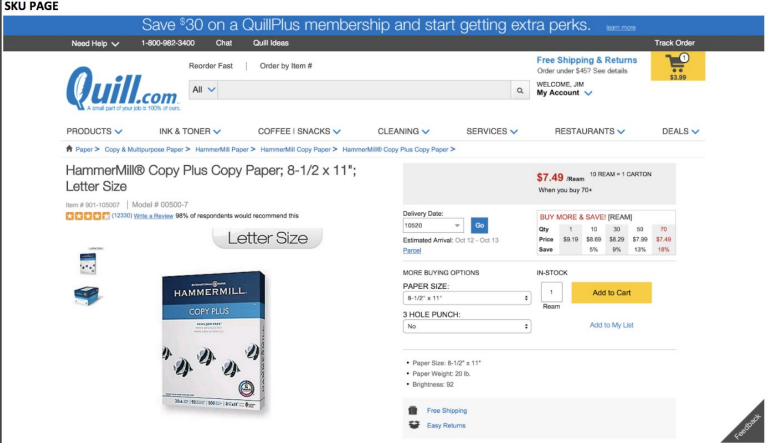


SHARED CART CUSTOMER STUDY

June 2017

Prepared By:
Jim Hall – Design Research Manager

Remote Interviews

# Remote Interviews - Report Out

The consolidation and interpretation of the raw data collected by the remote testing tool (usertesting.com) is key in communicating the results of the study to my stakeholders.

# Affinity Diagramming

# Building and Walking the Wall

Once the research is complete and notes are interpreted we can start to analyze the notes and build an affinity wall that will be available throughout the project so that the team can be 'steeped' in the data as we build a solution.
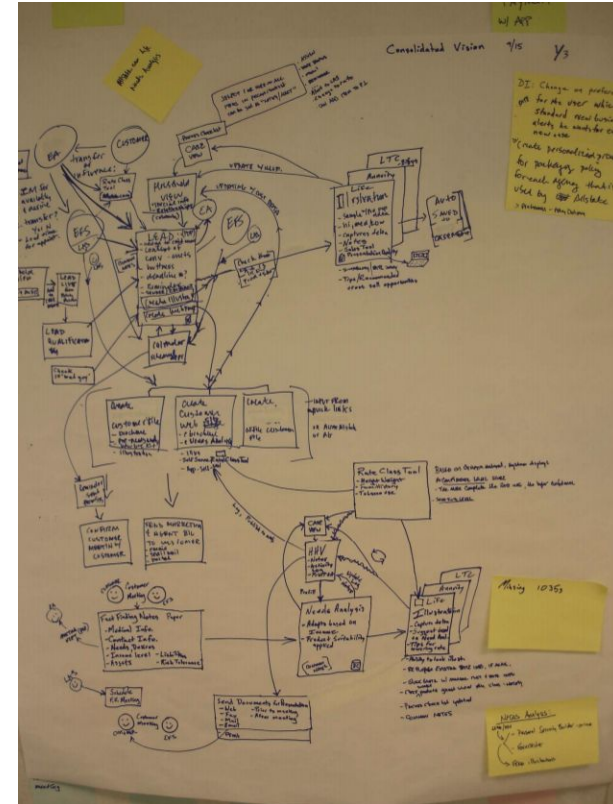
# Concept Designing

# Brainstorming and Whiteboarding

Bringing stakeholders together to brainstorm together grounded in the research is the best way to create a solution that is owned by the team.

We create a number of artifacts such as :

- **Vision Diagramming**
- User Flows
- Concept Designs

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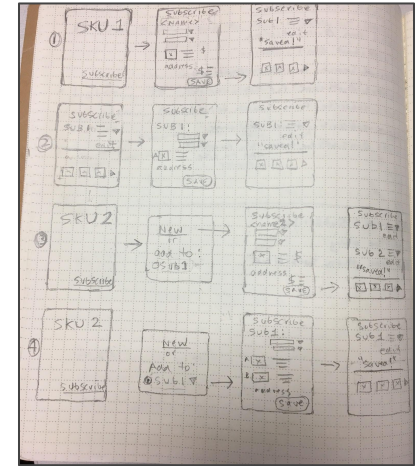- Vision Diagramming
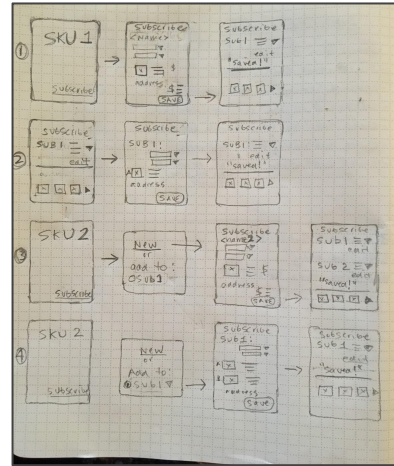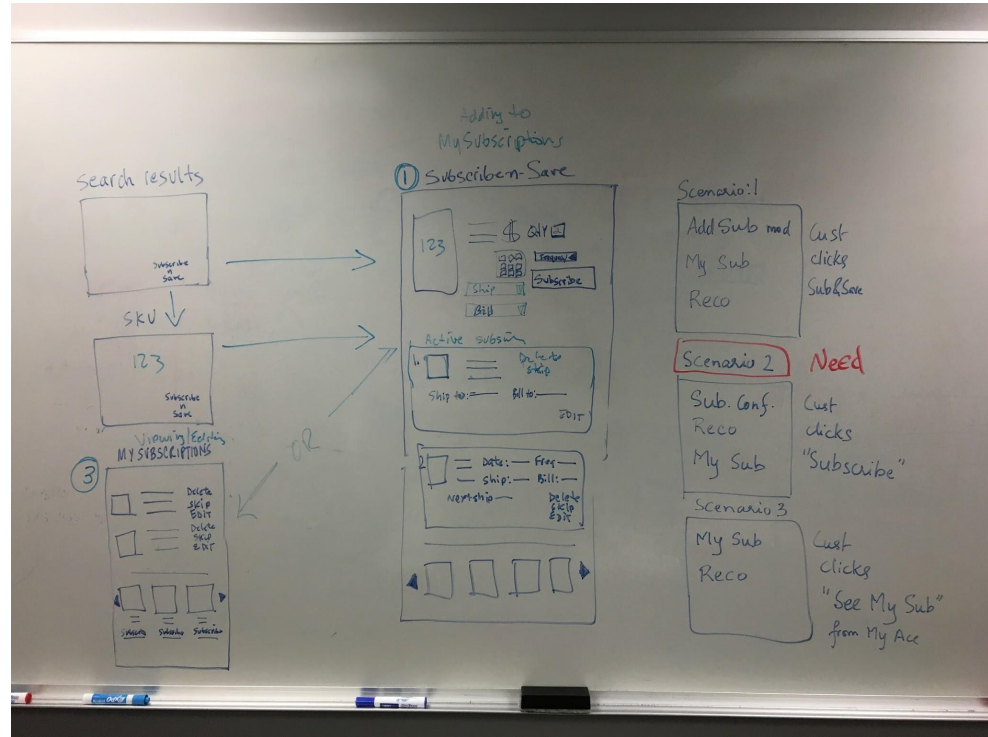- **User Flows**
- Concept Designs

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# Survey Designs

# Feedback and Insights Gathering

Listening to and interpreting the comments received by the customers in surveys is an excellent way to understand more about the customer and to uncover trends in the design.

These trends can lead to innovative business solutions as well as enhancements to the design.

## Coupon Report as of June 30th
*Feedback Survey - Quill Production*
August 11th 2017, 10:40 am CDT

**Q24 - In order for us to improve the experience please leave us some comments about your experience.**

In order for us to improve the experience please leave us some comments abo...

The coupons that were provided with my last order; are not listed on your website. They are for the Circulon cookware.

I would like to see more $ off coupons or accumulation of quill cash for a certain dollar amount spent. Also, price matching would be great

I placed an order for copy paper, cleaner, etc on 8/1. It is 8/7 and just now shipping....And I'm out of paper. Unless it is a specialty item or furniture, I have always gotten my order within 1 - 2 days. And over the over 16 years I've been ordering from Quill I have come to depend upon that quick delivery. Now I have this order and no one on chat and no one at c/s can tell me why this order isn't shipping until today....I'm down to my last ream of paper now and am now being told this won't be here until possibly Friday the 11th. I find that no one can tell me what happened this order preposterous and unacceptable c/s. I have had many office supply companies vying for our business and have always turned them away. Now I will have to use one of them to get the paper I should have had last week. I am very displeased and disappointed to say the least. I expected to get an answer. I would not be upset by the truth. Tell me hey, your order got hung up, someone dropped the ball - whatever - here's a $20 off coupon for your next order (or some such gesture) and I wouldn't be happy, but I would not be feeling the disappointment I am now, that's for certain.

We have been using multiple coupons for over a year. Now on our last order recap #75084839 we used 3 coupons and all three were approved. When we received our order yesterday we did not get the 3pc Mason Jar Mug Set with order over $200 did not get shipped. I have used the same three coupons in the past with the batteries, gift over dollar amount and money off and have always got everything. Now I am being told that you not longer do that. Then why is it still an option on the check out to use three coupons. They were all approved at checkout. You should honor the coupon.

Signed up with my email and was supposed to get coupon code within minutes. Has been 2 hours and nothing yet. ??

Our school hates the new website and the whole coupon mess now. It was so much easier the old way and plus you could combine more coupons and the deals were a lot better and you had more of a selection. We would order from your company because of all the awesome coupons and free gifts because we would use these things for our harvest carnival and other things, so we have not been ordering as much and probably will not order much in the future because a lot of the stuff is cheaper on Amazon but we loved the great deals we use to get but that had started to change even last year but with this new change a few months ago, it is awful. Thanks and hope you have a great day.

Your new "fewer restrictions" coupon promotion is inaccurate. There are actually more restrictions. We used to be able to use multiple coupons as long as they were different promotions. For example, we would get the coupon for free cookies with our statement and $20 cash back with a purchase of $175 or more and could use them both. Now we can only get one or the other. Or we could use both a minimum toner purchase and a minimum cleaning supply coupons at the same time. Now we can't.

# Concept Presentation Example

# Deals and Coupons Experience

Here is an example of a project proposal I created based on trends I pulled out from customer interviews and direct feedback off the site.

I partnered with UI designers, SEO and Web Analytics to tell the customer story.

This proposal resulted in a new coupon strategy and design that has contributed to an increased AOS and revenue as well a positive customer experience.

**Deals**

**Purpose**

- Deals and coupon shopping are a major factor when looking to purchase products online
- Our Quill customer knows and expects that Quill will have the various deals, coupons and free gifts
- Deals and Coupons is the most active category of comments on our 'Feedback' survey
- Finding and using these deals is often a poor experience and negatively impacts the customer experience
- Complete redesign of the deals experience on Quill.com is necessary
- Creating a clean, consistent and intuitive deals experience will help improve the Quill customer experience and increase customer retention, acquisition and AOS.