



Asset Management Application Usability Testing

May 8, 2012

Overview

Participating in user research with Agents is always interesting, thought provoking and provides a unique perspective on the way Agents work and do business.

Many of the findings reinforce what we have previously learned from Agents. They want to be able to find things quickly and spend as little time on company applications as possible to complete the tasks they need to complete.

To find Marketing materials today they use the Google search on Portal with varying results (mostly bad) and use the site navigation to find things in the marketing section of content pages. Agents did not mention using WIN specifically for marketing materials or the L&A marketing application as ways to find marketing materials.

The results from Agent testing showed that Agents were able to utilize the Asset Management search effectively both in the main application and its applet form, and were excited by the prospect of having a better means of finding marketing information in a single location through an easy to use format.

Many Agents gravitated towards using the filters as a primary means of finding materials, but were able to use multiple filters and search efficiently and effectively throughout the tests.

Agents appreciated the simple and clean display, limited and structured options, and where the display was more complicated they voiced that they were "busy".

The remainder of this document highlights the different phases of the tests, reflects the original goals with the findings and recommendations based on the testing and usability heuristics.

Findings

Current Process:

To find items today many Agents enter the ID number or marketing piece title into the Google search bar to find results on Agent Portal. The majority of Agents thought the more effective way to find materials was to search under the resources tab. A couple of Agents did not use brochures noting response rates were not as high as other materials.

Agents are unhappy with the results of the current search, and anecdotally spoke of searching for items for half an hour through multiple queries. One agent said "Frustration is not our friend."

Many agents noted that they prefer not to print items, some to avoid using their supplies; others because the paper stock, printing and binding were not at the level they would want.

One agent admitted to saving items locally.

General Application:

Photos were a big bonus for the agents. They were able to positively locate items by viewing the photos returned. Secondly items were identified by name, and then by ID number. In one instance an Agent requested a larger photo on the details screen.

One Agent related the use case of returning from sales meetings with a brochure or marketing piece, handing it to his staff and requesting them to "find this". He stated he thought it would be easy for his staff to use.

Once items were located Agents primarily clicked on the photo in the information box to launch the details screen.

Agents understood the difference between this search and other applications such as MOD. There was an expectation that any link between this search and outside applications would take the user directly to the marketing item. This expectation was stated multiple times.

Of the Agents queried all thought tab placement was good for the tool, but noted wherever it was placed should be easy to find. Additional placement ideas were to have saved items appear on the Workspace tab and the application to appear in the toolbox.

All Agents tested preferred to click enter to begin a search instead of utilizing the "Go" button.

One agent believed it would allow better marketing choices to be made by having items within the Asset Management tool instead of searching for items on Portal.

Filters:

Many agents gravitated to filters as a primary means of viewing results. The categories were easily understood and met their expectations on how things should be organized. The only notable exception

- the term “vehicle” was confusing. None of the Agents participating in the tests read any of the descriptive materials about the filters.

Filters were used ubiquitously in both the full application and the sidebar applet. In both instances they were seen as clear and user friendly.

Agents understood the way the filtering worked. Primarily a single filter was used for most tasks. In some instances a secondary filter in another category was used or the filter was used in combination with the search field to limit the results. This was a well understood paradigm.

Results:

Most of the information in the details screen was bypassed. While the information did not cause major confusion, a few of the attendees noted the screen was “busy” and contained information that was not relevant to them; one agent called the details screen “technical stuff”.

A couple of Agents saw the extra information as helpful, most notably the keywords, not as a navigation aid, but as information to see how we categorized things.

There was an expectation by a couple of Agents that the search would build off their profile, only displaying items that were within their licensed states.

In the majority of cases Agents understood and utilized the “view all results” link, gravitating to the function to see more information even if the requested task matched the results. Agents preferred the photo view of results and did not have a problem following the results link to another page to see more results.

There was a preference from the majority of agents to want to email items, either entire brochures or as a means of communication to order things for them from the GO. In the instances of emailing things to clients directly the request to have it personalized with their information was heard multiple times. The cost of printing/postage was mentioned multiple times as a primary reason for preferring email.

The ability to order the item right from the details screen was heard numerous times. Agents wanted to find an item and email the GO to get materials for them.

Agents though the other options (such as MOD) should be in the left pane near the download option.

Features:

The Agents polled thought the “Hot”, “Popular” and “New” were useful functions, especially for newer agents but were confused, mostly by the differences between “New” and “Hot”. The intent of “Popular” was understood by the majority of Agents.

Agents responded favorably to the document queue and its ability to set documents aside and hold past items. One Agent was worried that the queue might be overloaded with content over time and suggested a limit to saved items.

Auxiliary Findings:

- A couple of agents noted that the resources tab had too much stuff.
- One agent said he wanted to be able to hide unused toolbox items from view.
- A couple of Agents noted that Build, Grow, & Enjoy are not used consistently across the site and can cause confusion.
- A couple of Agents noted it was difficult to find forms within the Forms Library, mentioning that only exact searches produced appropriate results.
- One agent requested the ability to package multiple items together to send to clients.

Findings vs Initial Goals:

1. Insure the user can easily and successfully interact with the application and applet screens.
Users were able to successfully interact and use both the application and applet screens. Agents had no problems entering search criteria, receiving results, modifying their search criteria easily and using filters to refine their searches.
2. Identify general asset searching habits (Current Task Analysis)
As indicated in the current process section of this document, agents currently use Agent portal search and sections of the Agency Portal content to locate relevant documents as well as using external applications such as MOD and local GO stores for materials.
3. Identify habits and preferences related to utilizing Assets (Current Task Analysis)
While some agents spoke of saving items locally there was a large number of Agents interviewed that utilized MOD to send out materials or ordered them locally from their GO. Many had a preference to send materials via email and an aversion to print materials on their own.
4. Determine if the interface allows the user to find granular assets (items via number or name) utilizing the Asset search application and Asset search applet.
Agents were equally comfortable using the applet and application versions of the Asset Manager searching for granular elements.
5. Determine if the interface allows the user to find generic assets (items via topic or product) utilizing the Asset search application and Asset search applet.
One of the surprising outcomes of the test was the large degree that Agents gravitated to utilizing the categorization of elements. Within the tests all categories were used to a greater or lesser degree.
6. Determine if the interface allows the user to find exploratory assets (items via HOT, popular or New) utilizing the Asset search application and Asset search applet.
Once explained, reaction to "HOT", "Popular", and "New" was positive with the "Popular" category being the best understood and anecdotally lead to the most usage. There was disagreement on the names of the tabs, mostly the differences between "New" and "HOT".
7. Determine if the snippet information is enough information to make appropriate selection information for both the application and applet.

Most Agents used the images and the means of correctly identifying the materials searched for, secondarily the title and lastly the ID number. One Agent was specifically confused by the creation number info on the tile. All the other Agents glossed over the info other than the title and photo.

8. Determine if the meta information on the details screen is sufficient, too much or not enough information.
Numerous Agents commented that the details screen was “busy” or contained “technical stuff” that was not meant for them. One agent liked the idea of showing the categorization information to better understand how we organized materials.
9. Insure the user can successfully transact with assets (ie: download, use within MOD, eComp)
Users had the expectation that if there was linkage between systems that they would go directly to the viewed item. Most expressed the wish for email ability, both for customers and GO staff.

Recommendations

Agents liked the clean uncluttered interface with limited options. The had no specific problems utilizing the search or filters. The recommendations below are based on this testing and general user experience heuristics:

Remove the extra text

In the testing, the text below audience, product and the other filters was not viewed but the Agents had an inherent ability based on previous user experience to understand the functionality without the descriptive text.

The screenshot shows the 'Agency Portal' for New York Life. At the top, there's a navigation bar with links like 'PORTAL A TO Z', 'SETTINGS', 'LOG OUT', and a search bar. Below this is a secondary navigation bar with 'Home', 'My Workspace', 'Resources', 'Career Development', 'News', and 'Asset Search'. The main content area is titled 'Asset Search' and includes a welcome message and search instructions. It features a search bar with a 'GO' button and tabs for 'Search', 'Hot', 'Popular', and 'New'. Below the search bar are four filter panels: 'Audience' (with a dropdown for 'Lifestages (all)'), 'Product' (with a dropdown), 'Topic/Concept' (with a dropdown), and 'Format/Vehicle' (with a dropdown). At the bottom, there's a 'Results per page' dropdown set to 16, and a pagination bar showing '1-16 of 20 Results' with links for '1', '2', and 'Next'. The results section displays four asset tiles, each with a title, ID, date, and size, along with a thumbnail image. The tiles are: 'Family Protection Brochure' (14037, 04/10, 49k), 'Path to Financial Security' (14278, 08/11, 1.3mb), 'Why Term Mini Brochure - Montana' (14242MTPDF, 08/11, 1.2mb), and 'WhyTerm Mini Brochure' (14242, 08/11, 2.3mb).

Consider removing dual filters

When a user selects a dropdown filter another is placed below it to do multiple filtering in the same category. Based on watching the agents complete tasks, this filter could be deferred to a future phase. The Agents tested thought in broader terms, such as all Lifestages or one specific and tended to not do recursive filtering in a single category.

Filtering works

Almost all of the Agents in the tests gravitated to using filters as the primary sort of information. The filters work, and reduce the cognitive load of trying to determine a keyword initially.

Define tabs

Almost universally Agents understood the “Popular” tab. The definitions for both “New” and “Hot” were mixed. It is recommended to remove of the tabs to avoid the confusion.

Information overload

Reduce the data fields presented to the agent. Consider removing all the info on the right most column plus Business Unit Owner. Move the “Also Available in” to the left column. Agents who commented on it expected it there.

Don’t link out

If it is not possible to link directly to items within another system then no links are better. It is better to not set up the expectation of direct linking then to provide an application link. Agents already know how to get to other applications through the portal.



Agency Portal



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★★★★★

Brochure that describes NYL's Yearly Convertible Term Series and the Level Premium Convertible Term Series.

Size/Type:	409.62 KB - PDF	Keywords:	Yearly Convertible Term, Term Brochure, Level Premium Convertible Term, AD110 Term, YCT
Printed Size:	8.75" x 11.25"	Audience:	Consumers, Agents
Format/Vehicle:	Ad	Product:	Term Insurance
Use In:	All States & Territories	Topic/Concept:	Term insurance can be the first step in the road to cash value building permanent insurance
Language:	English	Primary Market:	Young Consumers (Build)
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Default Filters to viewable

On the Asset portlet the filters were defaulted closed until someone hovered over them. Best to default open since they were so frequently used.

Reexamine results presented

Most of the Agents tested expected the results to be either generic (open to all states) or only be from within their states of licence.

Refine portlet results

Since the majority of Agents both clicked on “See full Results” and found items by title it is recommended to remove the type and size information from the portlet results display. Both these informational elements are listed in the main application results display.