

## Intuit | InsightMobile Connections

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### Introduction

#### User study

Sliced Bread Design conducted a usability test of InsightMobile Connections on January 23, 2012. The purpose of the test was to gather insight into the **First Use Experience** which included finding information about the app on the Insight website, downloading it, and installing it on a mobile device. The test was limited to the version of the app for iOS on iPhones.

None of the participants had used the product, though all had heard about it to varying degrees. Some had tried to install but were unable to due to a bug with iOS 4.2.

#### Participants:

- **Elizabeth:** PR manager, 10 months@ Intuit
- **Sylvia:** UX manager, 6 years @ Intuit
- **Veronica:** Executive Assistant, 4 years @ Intuit
- **Charles:** Product Manager, 2 weeks @ Intuit
- **Monica:** PR, 2 years @ Intuit

### Highlights

#### Top Successes

- Users were very happy to have this app and are excited about the ways it will help them at work
- Users were generally pleased with the design, content and functionality
- Users were delighted by the ways Connections improved upon the online directory: better UI, favorites, managers, direct reports, simplified contact details, service listings, click to connect, etc.

#### Top Issues

- Users got confused when they encountered bugs: cached info sticking around too long, auto-complete delay too short, disconnect/reauthorization issue, sluggish response, 4.2 compatibility, etc... This was the biggest issue we found and it overshadowed the other minor usability issues.
- The first few steps the users took inside the app were tentative because they were initially expecting the app to feel like a populated directory.
- Users expected the Services listings to behave more like the People listings.
- Add to Favorites scrolled off the screen and mechanism for selection of the default contact method was unexpected.

## Findings

### Preconceptions and Expectations

- Most users had at least a vague idea of product and used the word “directory” to describe their concept of what it was.
- When asked what they would do if they wanted to find the app so they could install it, most vaguely remembered seeing the banner on insight and said if there wasn't the banner ad, they would do a search on Insight or ask a friend.
- Before using it, one user said she looked forward to seeing it because it sounded easier than searching in outlook because everything would be all in one place.
- Most were expecting their experience with Connections to be similar to using the directory online and were **delighted** to find it a much better experience.
- When users were introduced to functionality that was non-obvious, such as the ability to look up conference rooms, they commented that having an overview of the features before installation would be nice (e.g., an explanatory video that is launched after clicking on the banner.)

### Banner ad

- Most really liked the banner ad, both in terms of form and content.
- Some commented how this is a better way to discover it than have it “get lost” in the news.
- Users expected to get more information about the app before “installing” it, mainly by clicking on the banner anywhere but on the “install” button.
- The web page that came up after users clicked install seemed unpolished.
- Some expected install to bring up a page similar to the one they might see in the App store.
- “I like the simplicity of the banner ad but wouldn't mind more information”
- InsightMobile Connections is a clunky name and is not used consistently elsewhere, sometimes it's just Connections or Insight Connections

### Recommendations

- Give users more information about the app when they click anywhere on the banner but “install” or provide a link to Learn more.
- Update the Learn more/install page to be more similar to what is found in the App store – with a description of the application and screen shots.
- Make sure that users can find the application through Search on Insight

### Email

- Most read the email before tapping “click here”
- Some admitted that when they tried to install previously on their own, they just tapped “click here.” and then realized they needed to be on their mobile device

### Recommendations

- Rewrite the email with better wording and styling to communicate the priority of the information.

### Installation

- Users commented that going from the website to the phone to install was awkward, but unavoidable and within their expectations.

- Most noticed and liked the “instant download” as opposed to what they usually experience: having to go through the app store.
- For the users who had tried but failed to install this previously, they were confused on that first attempt and did not know what to do. They wondered if it was their fault and seemed disappointed.
- Some noted that the insight application icon looked too washed out. Either turn off the iOS glassy effect that is automatically applied or make the icon darker to stand up to it.

#### *Recommendations*

- Have messaging for unsuccessful installs that informs the user what went wrong and what, if anything, they can do to be successful on the next try.
- Update the icon coloring.

### **Splash screen**

- Users commented that they liked this graphic, especially the way it tied in with the application icon and showed “connections”
- We noticed that the top of the Splash screen is cut off.

#### *Recommendations*

- Properly implement the splash screen graphic so the top isn't cut off.

### **How-to overlay**

- Users were mixed about this. They liked it as an introduction to what the app can do, but there were some confusing aspects:
  - Some said it made the screen behind it too dark so they couldn't understand what was going on.
  - one thought the arrows indicated a process flow
- “a nice little guide to what you can do”
- “I would just like to go directly to where I can start searching for people. “
- The word “Contacts” is misspelled

#### *Recommendations*

- Rethink how this screen will work with a redesigned initial Favorites screen. (see Feedback on Favorites below)

### **First Impressions**

- In general, once users saw a directory listing, they had very positive things to say: “Ooh this is fun”. Users liked the app because:
  - it was a more convenient access to the directory
  - Person details were much improved over the desktop directory [mobile shows the key information, not everything, and in a nicer format.]
- Some users missed a sense of the overall directory as a starting point, commenting: “How do I get to the main directory” and “I was expecting to have a list of Contacts there – like a starting point.”
- Users were able to recover from this expectation and reorient themselves to the workflow the app presented, but some were initially disoriented until they looked around.
- Many people tried to click the star icon in the middle of the screen (when there are no Favorites) thinking it might initiate search.

- This first screen provides instructions that give the impression that adding to favorites is the most important thing to do first in this app. It would be better to provide an overview screen that makes users feel that they have access to the entire Directory database as a whole.

#### *Recommendations*

- Redesign this screen, perhaps in tandem with the preceding overlay screen, so it gives the user better sense of having launched a directory

### **Service Numbers**

- The idea of service numbers was embraced but many of the actual items were confusing or not useful
  - “Why is India listed?”
  - “I would never use accounts payable?”
  - “I don’t know what the travel items are or which one to call. Is this Carson Wagonlit?”
- Some asked if this list could be filtered to show only items that apply to them/their location.
- Everyone had an idea of which service number (or two) would be most useful to them, other numbers seemed like they’d never be useful.
- The lack of detail on the service numbers was confusing across the board: everyone tried to click on them and expected to get more information, just like the contact details.
- Highlighting service numbers in blue when clicked was a bug as they didn’t actually go anywhere
- People wanted to know the phone number for a specific service and more information about what that service was
- There is no way to add Services items to favorites. New employees, presumably a large target of first time users of this product, often need to make calls to help desk, HR, etc.

#### *Recommendations*

- Consider treating service numbers like people listings: provide details and the ability to favorite them.
- Consider filtering the numbers by GPS location - with the ability to view other numbers via “More” menu or similar

### **Search**

- All users eventually noticed the “sensitive” predictive search and most were confused if not annoyed by the way it popped them out of text entry mode without warning because of the short timeout.
- When search as you type worked well they really appreciated having this feature.
- Some users had to type in the same search several times as they looked for people. Saving the search when you clicked back to it would solve this problem.
- Using the Cancel button to go back can be confusing in Search but is consistent with the way most Searches work iOS

#### *Recommendations*

- Explore implementing more Google-like search where you invoke it and see the last search term as well as its results.
- Increase the timeout for doing predictive search
- Explore if it makes more sense to have the “Cancel” button renamed “Back” when doing a search or if Cancel is still the appropriate solution

### **Contact Details**

- Users were delighted to see simpler, more useful information in the Contact Details than the desktop corporate directory. In general, this screen exceeded their expectations.

- Users liked having the cube number but nearly all commented that the number itself was hard to make sense of.
- Users liked seeing the title, but one commented they also wanted to see the business unit or department for someone with a more generic title like user researcher
- One user emphasized that it would be very helpful to see a contact's administrative assistant (being one herself, she knows it's often the only way to get through to an executive.)
- Users liked that you could see the manager and direct reports and most just knew what they would get when they clicked those. One user quickly put together how she could use this "hierarchy" to help her find people if she wasn't able to find them via search (e.g., unsure of contacts name or how to spell it.)
- We noticed the field labels were not as neatly implemented as elsewhere in iOS. In iOS, there is always a comfortable margin around label text and edge of label area. In this app, the labels run much closer to the edge of the label area.
- In the case of "Direct Reports", it feels awkward to have such a long label that wraps only to have a one or two character value for that field
- Values for contact fields that exceed the number of characters are truncated in other iOS apps; here they wrap awkwardly.

#### *Recommendations*

- Values for contact info, such as email addresses, that are longer than the space allotted should be shortened with ellipses. Shortening should come in the most logical place, which may or may not be the end of the value.
- The allotted space for field values should be defined as the space minus the space needed for the favorite icon PLUS a margin around the icon. The value and the icon should not come closer than 5-10 pix from the field area

#### **Text messaging**

- This was often the last thing users noticed on the detail screens. They found it interesting but it didn't seem useful (except to the most recently hired test subject.)
- It seems the current employee base is not in the habit of texting co-workers but this could change given how easy it is with Connections.

#### **Favorites**

- How to favorite a contact for the first time was not obvious in cases where the "Add to favorites" button scrolled out of view.
  - One person went back to the Favorites page and then back to the contact because they did not see this button initially
- Even when the button was obvious, it was always situated at the very bottom of the screen with no margin between it and the bottom of the phone which some found awkward to press.
- Most did not initially understand the "Favorites" stars next to the name and how they connected with "Favoriting" the contact: "Do I get all of her information or just the one with the star". However, all played around with it until they figured out that it toggled the contact method.
- Some users thought of favorites as something that you do to the person, not the contact method. Determining the contact method was considered a sub-task.

#### *Recommendations*

- Consider putting the Favorites star on the person (i.e., near photo) then use something else to show/toggle the primary contact method. Or consider implementing this more like iOS contacts with a pop-up to select the contact method.
- Consider making the star buttons blue to link with the "Add to favorites" icon.

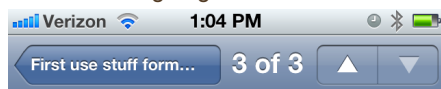
- Consider redesigning the Add to Favorites button so the “plus” sign is more legible.
- Add more space below the buttons so that they do not appear flush with the bottom of the screen.

## Navigation

- We did not observe confusion with the navigation. Most users tapped on the back or home buttons without sharing whether the buttons were doing what they expected them to do.
- One user said he expected the back button to behave more like he perceives it on the iPhone but then appreciated how it traversed back through his steps (of clicking direct reports and managers) until he got back to his original query.
- Most users used “cancel” on the search expecting it to behave the same as “back”. One thought the word “cancel” was confusing but used it successfully.

## Recommendations

- Consider putting the name of the destination on the back button as in other iOS apps such Mail to make it more clear what is going on:



## Edit button

- Most did not notice this button, even when asked “how would you delete a favorite?” while on the Favorites screen.
- Of the users who did notice it, they did not immediately connect it to the Favorites; one thought she would use that button to edit her own profile.
- One user wanted to reorder the favorites and that’s when he noticed the edit button and tapped it, expecting to find “reorder” functionality there.
- Most selected the contact to remove it from favorites: all users remembered seeing “Unfavorite” was an option on the contact details screen.

## Recommendations

- Remove Edit button from UI until reordering is introduced
- Consider reorder as an enhancement for a future release; for now consider organizing Favorites alphabetically.

## Bugs

Users experienced several bugs that undermined their confidence in the application, stating that it “lacks polish”. The following is a list of the bugs we observed:

- Tapping someone’s direct reports didn’t always bring up the list of direct reports (for example, for Shawn Wilson)
- Stars on toggle primary contact method sometimes needed several taps before they worked
- Cached items are shown momentarily before the invoked item refreshes the screen which is often very confusing
- Message to “hold tight” appears too late to be reassuring
- “Seems slow”
- Tabs (Favorites/Service Items) don’t highlight consistently
- After tapping “edit” : can’t always uncheck someone you have check to delete from favorites

### **Other Findings**

- We noticed that when an error screen reported “problem accessing the network” we felt we needed to troubleshoot something on our end. However, when the error message said “hold tight” we felt confident that there was nothing wrong with our system and that the app would successfully move on after a necessary pause.

### *Recommendations*

- With improvements to both the wording and timing of error messages, you can change users’ perceptions of delays from “this is broken” to “this is the way the app normally functions”.

### **Wrap-up Comments**

- Users got excited thinking about all the future possibilities for the app. For example, those that tried the conference room search, commented that they would like to see availability for rooms and book them right there.
- All were eager to try to put it on their own phone.
- One said that this is going to be really helpful for all those times when she needs to contact people outside of “office” hours.
- Representative quotes:
  - “Love it.”
  - “It’s just the right kind of information”
  - “Great job.”