

DG MACK



User Experience Research for edX: Test Plan Appendices

Appendix A: Moderator Guide

Appendix B: Screener

Appendix C: Consent Forms and Honorarium

Client Contact

Name: Alyssa Boehm

Email: aboehm@edx.org

DG MACK Contact

Name: Grace Phang

Email: grace.s.phang@gmail.com

Date

February 28, 2017

Participant ID:

Date:

Start Time:

Moderator:

Web Browser:

Remote *or* In-
Person



Appendix A: Moderator's Guide

DG MACK

Michael Andryauskas

Andrea Cantú
Corey Comenitz
Kristina Eastham
Deb Ercolini
Grace Phang

SESSION BREAKDOWN

Here is the suggested breakdown of session flow and approximate duration of each activity.

Task	Goals	Time
Introduction <i>Briefing & Pre-Test Questions</i>	<ul style="list-style-type: none"> • Orient participant to the study • Gain consent • Understand participants' motivations and expectations 	10 min
Task 1 – Homepage Review	<ul style="list-style-type: none"> • Understand participants' first impressions • Validate site relation to competitors • Discover participants' preferences for account creation vs exploration • Validate site purpose 	5 min
Task 2 – Find a Course	<ul style="list-style-type: none"> • Discover participants' searching and browsing preferences 	10 min
Task 3 – Register edX Account & Enroll in a Course	<ul style="list-style-type: none"> • Understand difficulties that first time users need to overcome before they can officially take a class • Understand user's expectations of what should be happening when actions are taken 	10 min
Task 4 – Review a Current Course	<ul style="list-style-type: none"> • Understand how the course content aligns with expectations. 	8 min
Task 5 – Review an Upcoming Course	<ul style="list-style-type: none"> • Understand how the upcoming course aligns with expectations. • Examine possible causes of attrition. 	7 min
Post-Test: Terminology Questions	<ul style="list-style-type: none"> • Determine if participant's find course terminology clear or confusing. 	10 min
Post-Test: Debrief	<ul style="list-style-type: none"> • Gather the participant's final thoughts on the website and their experience today. • Identify the web site's strengths and weaknesses 	5 min
Positive SUS	<ul style="list-style-type: none"> • Measure overall satisfaction 	5 min
Total time		70 min

PARTICIPANT BRIEFING (WE'LL PARAPHRASE)

Welcome

Thank you for participating in today's session. My name is [facilitator's name]. I work at DG MACK and have been contracted by edX to carry out this independent usability study. I will be facilitating today's session.

Session Details

There are three parts to our session:

- **First**, I'll ask you a few **background questions**.
- **Second**, I'll ask you to perform **several scenarios** and share your feedback.
- **At the end of the session**, I'll ask you about **your overall impressions** of using the website.

The session will last about **70 minutes**, so we will be done at [end time]. Is that OK?

Thinking Aloud I'm going to give you tasks to work on with the website. While you are working, I'd like you to think aloud. In other words, I'd like you to tell me what you are thinking, describe the steps that you are taking, what you are expecting to see, why you are doing what you're doing, and so on.

Feedback and Honesty Your comments are very important to us. So, we ask that you give us your open opinions (both good and bad) of what you see. Don't be shy – feel free to give us honest feedback. Because we are not responsible for the design of this website, we won't take any of your feedback personally, either positive or negative. Feedback from you and other participants will help us evaluate the design of the website. One important point I'd like to highlight is that we are evaluating this website, but not testing you in anyway. Difficulties you may run into reflect the design of the website, not your skills or abilities.

Observer My role here is as a neutral observer. I will be taking notes, but will be mostly silent while you are working. I will attempt to answer any questions you may have at the end of the session. There are other observers of this session. They are here to take notes and record your actions.

Consent Form Did you have any questions about the consent form that you signed?

Recording and Data Policy: We will be recording the session to get an accurate record of your feedback. The recordings will only be used for this project. The data from this study will not be used for any other purpose. Your full name will not be associated with the recordings or any other data collected during the session.

Timing: We have a lot to get through today and a limited amount of time, and we want to make sure we get you out on time. I may move things along to ensure we stay on track time-wise. I don't want you to feel like I am not valuing what you are saying if I move things along. I respect the time that you have set aside to be here, and I want to make sure we get you out at the time we promised.

BACKGROUND QUESTIONS [5 MIN]

- Why are you interested in taking online courses -- either through edX or another platform?
- Tell me about what types of professional skills you're interested in acquiring.
- What other tools or platforms – online or offline – have you used in the past for professional skills development?

TASK 1: FIRST IMPRESSIONS [5 MIN]

Record task start time: _____

Start this task from the edX home page.

Task Prompt

You want to take an online course, and a friend told you about the edX website. You decide to take a look at it. Without clicking anything yet, feel free to explore this screen as you normally would.

Observations/ Take Note of:

- In which section does the user decide to stop?
- What information does the user decide to read?

- **Moderator Notes:**

- *Redirect participant if they wander off task.*
- *After 3 minutes, proceed to post-task questions.*

Post-Task Questions:

- What do you think the purpose of this site is?
- How would you start using this website? What would you click or do next?

TASK 2: FIND A COURSE [10 MIN]

Record start time: _____

Start this task from the edX home page.

-

- **Task Prompt**

You've been assigned to a new project at work that requires you to learn accounting. You have no prior experience with marketing and decide to take a course on edX. You need to complete a class within the next two months and you'd like to take the most credible class you can find.

- **Observations/ Take Note of:**

- What the participant interacts with and their comments
- Using the course filters? What filters are they applying?
- Do they notice/ understand the course-type banners? (verified, Professional Education, MicroMasters, etc.)
- Did they click into a course to view more information?
 - What information are they gathering?

- **Moderator Notes:**

- *Redirect participant if they wander off task.*
- *If participant is still searching for the right course after 10 minutes, proceed to post-task questions.*

- **Post-Task Questions:**

- What are your thoughts on the course finding process?
- Do you feel confident that this is a course that will deliver on what you need? Why?
 - (If they didn't find a course) Was there a reason you couldn't decide on a particular course?
- What things were you looking at to determine whether or not this is the best class for you?
(Looking for if they notice the school name, timing, verified, etc.)
- Was there anything about the process that was difficult or confusing?
 - Was there anything about the process that could be easier or more clear?
(only ask if they haven't already addressed this)

POST-TASK 2 QUESTIONNAIRE

We will administer the following three standard ASQ questions, with a rating scale from 1 to 5, from strongly agree to strongly disagree.

1. Overall, I am satisfied with the ease of completing this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

2. Overall, I am satisfied with the amount of time it took to complete this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

3. Overall, I am satisfied with the support information (on-line help, messages, documentation) when completing this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

TASK 3: REGISTER EDX ACCOUNT & ENROLL IN A COURSE [10 MIN]

Record start time: _____

The moderator will navigate to the [Insert course name here] course overview page, where the task will start from.

Task Prompt

You ran the course you picked by your supervisor, and he told you he would like you to take this course instead, [insert new course name here] You should take the time to sign up for this class. Here is the first name, last name and email address we would like you to use during testing:

- [first name] , [lastname] , [emailaddress]

Observations/ Take Note of:

- What the participant interacts with and their comments.
- How users would normally register an account (i.e. Facebook, Windows, Manually)
- What information does the user decide to fill out on the registration form?
 - Ask them to elaborate on why they think that information is important for edX to know if they didn't already tell you.
- What do participants expect to see after they press a button?
 - Ask them about their expectation specifically before they actually interact with links.
- Do participants feel obliged to confirm their account before taking a course?

Moderator Notes:

- *Redirect participant if they wander off task*
- *Provide participant with a fake first name, last name, and email address to use when filling out the form*
- *After participant's fill out registration form and hit "submit," ask **"Would you normally check your email to verify your account or proceed on?"***
- *If the participant presses the "Register" button in the top navigation menu first, when they complete registration, they will land on the courses dashboard.*
 - *If they wish to go back to the course overview and they don't take any action for a minute, tell them to press the browser's "Back" button once to return to the course overview page.*
- *On the create account page, do not let them press the Terms of Service and Honor Code link.*
- *If the participant asks which button to press on the course enrollment page or ask about financials, tell them that **"We haven't heard from HR in regards to whether your***

company can compensate you for anything official. “

- *After 7 minutes, proceed to post-task questions*

Post-Task Questions:

- What were your impressions of the registration and enrollment process?
- What was difficult or confusing?
- Is there anything about the process that could be easier?
-

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TASK 3 REGISTRATION INFORMATION (TO BE GIVEN TO PARTICIPANT)

Name: John Doe (if male)
Joan Doe (if female)

Email Address: Bentley2017_edXtesting+insertnumber@gmail.com

POST-TASK 3 QUESTIONNAIRE

We will administer the following three standard ASQ questions, with a rating scale from 1 to 5, from strongly agree to strongly disagree.

1. Overall, I am satisfied with the ease of completing this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

2. Overall, I am satisfied with the amount of time it took to complete this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

3. Overall, I am satisfied with the support information (on-line help, messages, documentation) when completing this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

TASK 4: REVIEW A CURRENT COURSE [8 MIN]

Record start time: _____

Before starting the task, the moderator will login to a different user account which is enrolled in two courses: one current, and one upcoming.

The task will start on the user account's dashboard.

Task Prompt

Now that you have enrolled in the course, you want to understand how the (insert name) course works. Take a few minutes to explore the course.

Observations/ Take Note of:

- What the participant interacts with and their comments
- How are they deciding which pages to look at?
- What information was most useful to them?
- What is the first thing that they did on the course?

Moderator Notes:

- *Redirect participant if they wander off task.*
- *Prompts participant to skip over videos, browse content, and look at the first lesson if they haven't already*
- *After 4 minutes, proceed to post-task questions.*

Post-Task Questions:

- What are your impressions of what you just did?
- How does the course align with your expectations?
- Was there anything about the course page that was difficult or confusing?
- How likely are you to finish this course?

POST-TASK 4 QUESTIONNAIRE

We will administer the following three standard ASQ questions, with a rating scale from 1 to 5, from strongly agree to strongly disagree.

1. Overall, I am satisfied with the ease of completing this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

2. Overall, I am satisfied with the amount of time it took to complete this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

3. Overall, I am satisfied with the support information (on-line help, messages, documentation) when completing this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

TASK 5: REVIEW AN UPCOMING COURSE [7 MIN]

Record start time: _____

The moderator will navigate to the user account's dashboard, where the next task will begin.

Task Prompt

You have just registered for [insert course name], an upcoming course, and want to review information for the course. Find out the number of hours per week as well as the number of weeks it will take you to complete the course.

Observations/ Take Note of:

- *What the participant interacts with and their comments*
- *How are they deciding which pages to look at?*
- *What information was most useful to them?*
- *What is the first thing that they did on the course?*

Moderator Notes:

- *Redirect participant if they wander off task.*
- *Encourage participant to verbalize any difficulty they may have.*
- *After 4 minutes, proceed to post-task questions.*

Post-Task Questions:

- What are your impressions of what you just did?
- Did you find this process easy or difficult?
- Is there anything that could make this process easier?

POST-TASK 5 QUESTIONNAIRE

We will administer the following three standard ASQ questions, with a rating scale from 1 to 5, from strongly agree to strongly disagree.

1. Overall, I am satisfied with the ease of completing this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

2. Overall, I am satisfied with the amount of time it took to complete this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

3. Overall, I am satisfied with the support information (on-line help, messages, documentation) when completing this task.

Strongly agree	1	2	3	4	5	Strongly disagree
----------------	---	---	---	---	---	-------------------

POST-TEST: TERMINOLOGY QUESTIONS [10 MIN]

Record start time: _____

The moderator does a course search for “management” and shows the results to the participant.

Questions:

- *Did you notice that there are different banners on the course thumbnails?*
- *What is your interpretation of their meaning?*
- *(Scroll to a section of the results that displays a course and a program) What do you think the difference is between COURSES and PROGRAMS?*
- *(Point out a course that has not begun yet, and point to the date) Did you notice any courses earlier when you were browsing the website that had a date like this?*
 - *What do you think this means?*
- *(Point out a course that is labeled “archived”) Did you notice any courses earlier when you were browsing the website that said “Archived” like this?*
 - *What do you think this means?*
- *(Open a course page and point out the University logo) Did you notice that the University that developed the content is listed on the course page? How important is that to you?*

POST-TEST: DEBRIEF [5 MIN]

- What are your overall impressions of this site?
- How does this site compare with other eLearning software?
- What two things did you like best about using the edX website?
- What two things did you like least about using the edX website?
- Do you have any final comments or suggestions you’d like to share that we have not had a chance to discuss yet?

POSITIVE SUS [5 MIN]

We will administer the following ten standard positive SUS questions, with a rating scale from 1 to 5, from strongly disagree to strongly agree.

- I think that I would like to use this website frequently

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I found the website to be simple

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I thought the website was easy to use

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I think that I could use the website without the support of a technical person.

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I found the various functions in this website were well integrated

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I felt the website was consistent.

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I would imagine that most people would learn to use this system very quickly

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I found the website very intuitive

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I felt very confident using the website

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

0. I could use the website without having to learn anything new

Strongly disagree	1	2	3	4	5	Strongly agree
-------------------	---	---	---	---	---	----------------

Thank you for your participation!

AFTER STUDY, SUMMARIZE THE SESSION BELOW WHILE IT'S STILL FRESH IN MIND. INCLUDE KEY FINDINGS, EVENTS, INSIGHTS, ETC.

DG MACK



Test Plan: User Experience Research for edX Appendix B: Screener

Client Contact

Name: Alyssa Boehm

Email: aboehm@edx.org

DG MACK Contact

Name: Grace Phang

Email: grace.s.phang@gmail.com

Date

February 28, 2017

Name: _____ Telephone: _____

Email: _____ ZIP Code: _____

Hi, My name is _____. I am calling from _____. We are considering some new ideas for an online learning site and would like your feedback. This will help us improve the new student experience for online learners like you. Would you be interested in participating?

- Yes
- No

The session dates, duration and location are...

Dates: _____

Duration of session: _____

Location: _____

Now I have some questions for you to determine if you qualify for this study:
Please indicate the answers to the questions below with an 'X'.

- What is your age? _____ DO NOT PROVIDE LIST, AFTER PERSON ANSWERS **EQUAL MIX**
 - Under 18 **TERMINATE**
 - 18-24
 - 25-34
 - 35-44
 - 45-54
 - 55-64 **TERMINATE**
 - 65+ **TERMINATE**
- Are you:
 - Working Part Time **AT LEAST 3**
 - Working Full Time **AT LEAST 6**
 - Full-time student **TERMINATE**
 - Homemaker/stay at home parent **TERMINATE**
 - Retired **TERMINATE** -
 - Unemployed, looking for work **AT LEAST 3**

IF THE PERSON IS NOT TERMINATED & WORKING, REQUEST THE FOLLOWING
OCCUPATION: _____
EMPLOYER: _____

IF THE PERSON IS NOT TERMINATED
INDUSTRY: _____

- Do you or any member of your household work in any of the following industries?
(PLEASE SELECT ALL THAT APPLY) – ARE THERE ANY INDUSTRIES WE WANT TO ELIMINATE?
 - Education **TERMINATE**
 - Auto industry
 - Fashion industry
 - Health care
 - Internet company
 - Marketing Research **TERMINATE**
 - Other (Please specify)
- Where do you live?
AT LEAST 4 in Boston area, at least 1 in San Diego area, at least 1 in New York City.
8 Max Remote
 - Boston, MA area AT LEAST 4
 - New York City, NY area AT LEAST 1
 - San Diego, CA area AT LEAST 1
 - Other **NO MORE THAN 6**
- When was the last time, if ever, you participated in any paid group discussions, interviews, marketing, or other type of research interview that lasted for 1 hour or more?
 - Within the last 3 months **TERMINATE**
 - Over 3 months to 2 years ago
 - Longer than 2 years ago
 - Never
- What type of device(s) do you use to browse the internet? **(PLEASE SELECT ALL THAT APPLY)**
MIN LAPTOP/DESKTOP
 - Laptop/Desktop
 - Tablet
 - Smartphone
 - Other _____
- What operating system do you use on your personal computer?
 - Macintosh **AT LEAST 6**
 - Windows **AT LEAST 6**
 - Linux **TERMINATE**
- How many hours per week do you spend on the Internet?
 - Less than 5 hours/week **TERMINATE**
 - 6-10 hours/week
 - 11-20 hours/week
 - 21+hours/week
- Which situation best describes your current career situation? - I NEED HELP WITH THIS ONE

- I am satisfied with my current job situation and skillset **TERMINATE**
 - I am looking to grow my professional skills in my current role
 - I am looking to develop new skills to acquire a new job
 - I am looking to develop new skills to advance in a current role or company
 - None of these describe my current employment situation (please describe)
-
- Have you engaged in any programs (online or offline) to develop professional skills or advance your career in the past year? If so which companies or programs have you used?
 - If edX.org **TERMINATE**
-
- Lynda.com
 - YouTube or other free videos
 - Reading blogs, articles, or online communities
 - General Assembly
 - Coursera
 - Khan Academy
 - Udemy
 - Other bootcamp/certificate programs not listed
 - Books or text books
 - Audiobooks
 - Training tools or platforms specific to a tool or company
 - Researched or applied for University-run degree program (Bachelors, Masters)
 - Enrolled in University-run degree program (Bachelors, Masters)
 - Researched or applied for University-run professional certificate program (no degree)
 - Enrolled in University-run professional certificate program (no degree)
 - Other (please list)
-
- How recently have you engaged in one of the above activities?
 - Within the last week
 - Within the last 2 months
 - 2-6 months ago
 - 6-12 months ago
 - 1-2 years ago **TERMINATE**
 - 2+ years ago **TERMINATE**
 - Never **TERMINATE**
-
- On a scale from 1-5, with 1 being "Not at all" and 5 being "Completely": **How willing are you to use applications or websites for professional development? **TERMINATE if DOES NOT SELECT 3, 4 or 5****

1

2

3

4

5

Not at
all

Completely

- Would you be willing to take part in a 75-minute online research session that will be recorded?
 - Yes
 - No **TERMINATE**
- Do you have access to the Internet and a laptop/desktop computer with videoconferencing capabilities?
 - Yes
 - No **TERMINATE**
- Are you available for a user testing session during the following dates? **Check all that apply**
 - Mar 27 – 31 **MAX 6**
 - April 1 – 7 **MAX 6**
 - April 8 – 10 **MAX 6**
 - I am not available during these dates **TERMINATE**

DG MACK



**Test Plan: User Experience Research for edX
Appendix C: Consent Forms and Honorarium**

Client Contact

Name: Alyssa Boehm

Email: aboehm@edx.org

DG MACK Contact

Name: Grace Phang

Email: grace.s.phang@gmail.com

Date

February 28, 2017

CONSENT FORM (BOSTON AREA PARTICIPANTS)

I agree to participate in the study conducted by DG Mack.

I understand and consent to the use and release of the recording, notes, and observations by DG Mack. I understand that the information and recording is for research purposes only and that my name and image will not be used for any other purpose. I relinquish any rights to the recording and understand the recording may be copied, used by DG Mack, and shared with edX without further permission.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator.

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date: _____

Please print your name: _____

Please sign your name: _____

Thank you!

We appreciate your participation.

CONSENT FORM (NEW YORK AND SAN DIEGO AREA PARTICIPANTS)

I agree to participate in the study conducted by DG Mack.

I understand and consent to the use and release of the session notes and observations by DG Mack. I understand that the information is for research purposes only and will not be used for any other purpose. I relinquish any rights to the notes and observations and understand they made may be copied and shared by DG Mack without further permission.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator.

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date: _____

Please print your name: _____

Please sign your name: _____

Thank you!

We appreciate your participation.

CONSENT FORM (REMOTE PARTICIPANTS)

I agree to participate in the study conducted by DG Mack.

I understand and consent to the use and release of the GoToMeeting recording by DG Mack. I understand that the information and recording is for research purposes only and that my name and image will not be used for any other purpose. I relinquish any rights to the recording and understand the recording may be copied, used by DG Mack, and shared with edX without further permission.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator.

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date: _____

Please print your name: _____

Please sign your name: _____

Thank you!

We appreciate your participation.

HONORARIUM

We thank you for your participation.

To receive an edX certificate for a verified course (valued from \$49-\$99) please fill out the following information.

Name: _____

Email address: _____

TASK 3 REGISTRATION INFORMATION (TO BE GIVEN TO PARTICIPANT)

Name: John Doe (if male)
Joan Doe (if female)

Email Address: Bentley2017_edXtesting+insertnumber@gmail.com