Accurants Research Protocol

<u>Team members</u>:
      Accurants 1: Zay, Samilee, Erika, Antonio, Caroline
      Accurants 2: Jeff, Hannah, Melissa, Manola, Chaela

Session 9/15/2020	1: Megan Burke Harris	2: Kristin Shardlow	3: Andy Krueger
Participant Context	Etsy for online sales and Square for in-person sales. Wave app for invoicing & wholesale or one-off orders	Squarespace suite for sales & inventory	Experience with inventory (creating/managing) and POS transactions; business owner/leader who has context for what the data around these activities might mean for the business and ways they may wish to view that data
Zoom link	https://zoom.us/j/97374500790	https://zoom.us/j/99654932374	https://zoom.us/j/97026355137
Time	10:00-11:00 AM	2:00-3:00 PM	5:30-6:30 PM
Moderator	Antonio	Melissa	Samilee
Tech Lead	Zay	Chaela	Hannah
Photographer	Erika	Jeff	Manola
Observer(s)	Everyone else	Everyone else	Everyone else

❏ ▸ Recording permission requested?

GOALS

- *Learn more about how managers or team members use the tools in their environment - (team roles, main context of use, training, cross over, team dynamics or differing needs)*
- *Gain insight into daily activities and environment to understand pain points, delighters, areas of inefficiency, and general context*

- *Better understand how well current tools are working, particularly with the key value propositions of Accurants in mind (integration, right fit, inventory, e-commerce) - what is working well, pain points, gaps and opportunity areas*
- *Gain insight into how Accurants platform might fit into a user's workflow or context. Initial impressions, gaps, benefits, areas of uncertainty, opportunities for improvement*

Script:

Thank you for letting us visit today to conduct our research. We're hoping to learn more about how *you manage your basic business operations and tasks.* We're hoping we can *have a virtual tour of your workspace, observe your frequent business-related tasks, & have you interact with our prototype* while I ask questions along the way. We'll mostly be observing and listening, to see how you do things, so if you can think-aloud (when appropriate) that is helpful for us to understand what is happening and why you're doing what you're doing. However, we understand that you are currently conducting business and do not wish to get in the way of you doing your job.

If it is easier for us to simply observe and follow-up with questions when you are not servicing customers (if you are with customers), that will also work. We can simply observe, taking notes and photos as you work, and we can later discuss as a group what was happening. Would that work easier for you?

Initial questions *(If not actively working yet or waiting to perform contextual inquiry)*
- How long have you worked here or operated this business? Have you had previous retail operations experience?
- If you are comfortable, would you mind showing us your current workspace or guide us through it? How has it changed in the last 6 months?
- Could you guide us through what other digital tools you may use to perform essential business operations? Why do you use these?
- Is there anyone, besides yourself, that utilizes these tools for your business? What are their roles, and how often do they utilize these tools?
- What does a great day look like for you when it comes to adding products or managing your business? What about a not so great day?

Task observations:

Creating an Account:

I am going to have you watch as I create an account. If you have any thoughts on this process, feel free to voice them.

　　　1.1. As a new user, where would you go next to get started?

Username*:* ux+acc1@primeacademy.io
Password: primeUX2020!

That's great. Thank you!

Now we're going to ask you to take a look at a digital tool called Accurants. Accurants is a tool that offers small and mid-sized businesses a full spectrum of business operations and resources.

The next thing I am going to do is share my screen.

Share Screen

Can you see my screen?

Now I will need you to control my screen from your computer. To do this, you will need to navigate to the top of the shared screen, and there you will see "View Options". Click that and a drop-down menu will appear. Select: "Request Remote Control". You will then gain control of my screen for the purposes of this session.

Once they have remote control

Great! Now we are going to take a closer look at how you use Accurants.

<u>Edit Account</u>:

Before we navigate through the next task...

> 2.1. With the digital tool you currently use in mind, what are some functions you rely on in order to make changes to your account?
>
> 2.2. Show me how you would update one of the settings you spoke to earlier, using this Accurants.

Wonderful. Thank you!

<u>Add Inventory/Product</u>:

> 3.1. The next thing I'd like you to do is navigate to your inventory. But before we do that, will you briefly summarize how you currently add items to your business's digital inventory?
>
> 3.2. Walk me through how you would add inventory or products on Accurants.
>
> 3.3. How did using this tool compare to other tools you've used to manage your online inventory?

Thank you.

Edit Inventory/Product:

4.1 In your work experience, what are some of the reasons you might need to modify/edit a product that already exists in your inventory?

4.2 Can you show me how you would use this tool to make some of the modifications that you spoke to?

4.3. Again, how did using this tool compare to the tool(s) you currently use?

Perfect, thank you!

Point-of-Sale (POS)

5.1 How do you currently process your sales?

5.2 What are some of the advantages and limitations of this system?

Reflection:

- Thinking back, what were some positives that stood out to you when using this tool?

- What did you find confusing or perhaps frustrating about it?

- How does Accurants compare to tools that you have used in the past or currently use?

Wrap Up:

We are nearing the end of our time together. In these last couple minutes, tell me any additional thoughts you might have about the site's offerings: If you could add any additional features, what would they be?

If you could get rid of or change any features you tried or saw today, what would they be?

Before we finish, I am just going to check in with my team to see if there are any additional things they would like to add.

We are all done! Thank you so much for being here today _____. We really appreciate your time. If you do have any questions after today, feel free to reach out to me on _____.

_____

Let's take a closer look at how you use <mark>[system]</mark>. *Could you start by showing me something you do most frequently, perhaps* <mark>[key task]</mark>.

(Otherwise simply observe the tasks they are performing, based on the job they are trying to do)

Task observed: _____

Key observations:	
Follow up format: *I noticed that you _____.* *Could you tell me more about that?*	

Example high-level categories to bucket observations into:

Look for:
- *Behavior/Mood*
- *Language, terminology*
- *Environmental Conditions*
- *Other tools and systems used*
- *Individuals interacted with, culture*
- *Pain points, Workarounds, Accelerators*

*Remember, **context** is more than environment.*

Context is all encompassing of surroundings and includes things like: workflows, language, people, other tools/systems that are used, artifacts, as well as environmental factors.

Process & Workflows
What are the primary steps in their process? Are they using accelerators or workarounds? Are there parts that appear particularly painful or smooth?

Environment
What is the work environment like? What are some things that may/may not be impacting their workflow? Are they able to make modifications to their workspace? If so, how does that look?

People Involved
Who is involved in the work? Where are they located in relation to each other? How do they appear to work together? How is this different from how they work separately?

Tools Used
*What tools are used during their primary workflow? Which tools are **required** and which are **optional**? Why have they been chosen? What are their strengths and weaknesses?*

Example note taker template

Session information:

Observer/Moderator	Location	Date/Time	Participant

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	Observations	Hypothesis / Questions
Process & Workflows *What are the primary steps in their process? Are they using accelerators or workarounds? Are there parts that appear particularly painful or smooth?*		***Follow up format:*** *I noticed that you _____. Could you tell me more about that?*
Environment *What is the work environment like? What are some things that may/may not be impacting their workflow? Are they able to make modifications to their workspace? If so, how does that look?*		
People Involved *Who is involved in the work? Where are they located in relation to each other? How do they appear to work together? How is this different from how they work separately?*	*Number of team members:*	
Tools Used *What tools are used during their primary workflow? Which tools*		

| *are required and which are optional? Why have they been chosen? What are their strengths and weaknesses?* | | |