

User Testing Plan

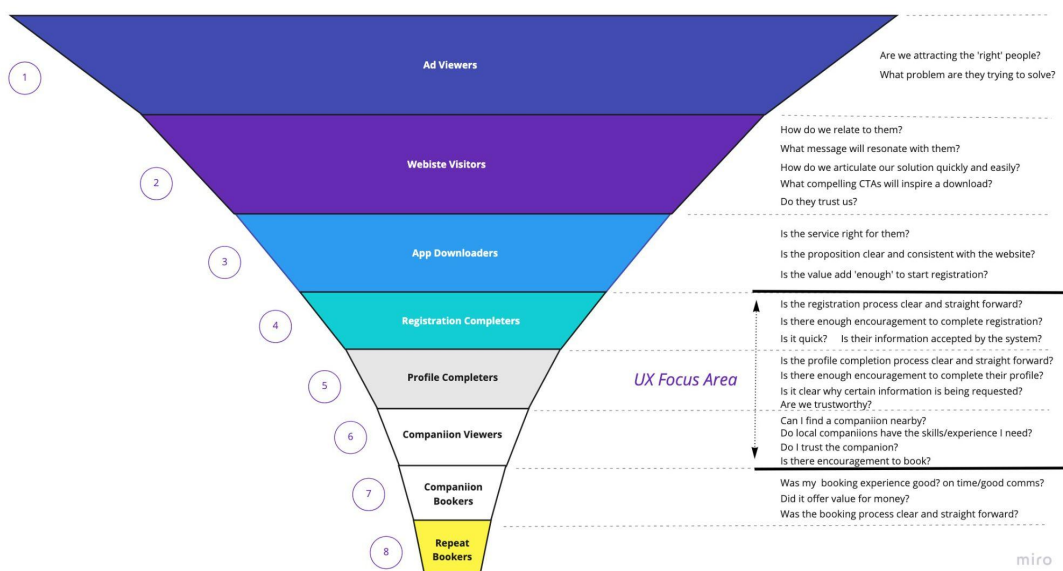
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1. Introduction

In order to kick start visits and ensure marketing spend gets the highest ROI, we'd like to reach out to new customers and observe their behaviour as they use the app, as well as speak to existing users about their experience using the app. We would like to learn about what barriers or hurdles there may be that prevent them from completing our major goals of Registration, Profile Completion, Companion Viewing and Companion Booking.

Our overall funnel is shown below, with the types of questions we should be asking listed against each funnel stage. This particular piece of work is focussed on funnel steps 4 to 7.



2. Business Goals

We need to understand pain points in the funnel steps highlighted above, using a mix of User Research techniques including but not limited to:

- Usability Testing
- Focus Groups for Market Research
- In-Depth Interviews

Usability testing is aimed at testing **how** users can use the website and the app to achieve what they need to do. For this usability testing brief, we primarily focus on new users.

Focus groups and in-depth interviews are primarily directed at learning about **why** they want to use the service in the first place, or **what** they think of it overall (their attitude). For focus groups and in-depth interviews, we can select from potential users or existing users, depending on the subject.

In addition to better understanding our users interpretation and thought processes whilst using the app, we would like to encourage a body of visits to take place whilst we are learning. **Ideally we would have at least 20 visits orchestrated through this piece of work, ideally including reviews. This is unlikely to be directly done within the usability tests.**

We would like all feedback to be well captured in a structured manner, so we can take swift actions in resolving pain points that are highlighted.

3. Usability Test recruitment

3.1 Organisers signup and verification (people who organise a visit for someone who needs companionship and pay for the service)

- 4 participants (2 x loved one, 2 x self) for unmoderated testing, at least 2 female and 2 male, to test the onboarding process only
- 12 participants (6 x loved one, 6 x self), for moderated testing, at least 3 female and 3 male in each, to test the full customer journey from onboarding through to completing a visit
- From the UK, locations in the top 10 cities that companiions has organisers, with minimum 3 participants from London
- Age range 30-66
- A range of incomes, with a household income of at least £30k per year outside of London, £45k per year inside London

Screenener questions

- City in which they live (must be top 10)
- Range of tech savviness (1-5)
- Ideally, they have an older relative or someone they know who could do with more companionship [optional]

3.2 Companions (people who provide companionship and get paid for the service)

- 4 participants for unmoderated testing, at least 2 female and 2 male, to test the onboarding process only
- 4-6 participants for moderated testing, at least 2 female and 2 male, to test the full customer journey from onboarding through to completing a visit

- From the UK, locations in the top 10 cities that companiions has companions, with minimum 3 participants from London
- Age range 20-66
- A mixture of students, employed, non-employed or retired people

Screenener questions

- City in which they live (must be top 10)
- Able to provide ID verification
- Able to provide proof of address
- Range of tech savviness (1-5)
- Ideally, at least 3 people who have a clean Disclosure and Barring Service (DBS) background check [optional]

4. Usability Tests

Usability testing is primarily aimed at testing *how* users can use the website and the app to achieve what they need to do. It is not directed at learning about *why* they want to use the service in the first place, or *what* they think of it overall (their attitude).

For usability testing, we need participants who do not have any prior knowledge or awareness of the companiions proposition. The scenarios to be tested are listed below.

4.1 Usability Test Structure

Participant Information to Capture

These may already be captured by the testing platform and will be checked.

- Gender
- Age
- Location
- Device model used
- Tech savviness/experience

Data to Track

- Time taken to complete the task
- Errors made
- Help required/given
- Comments made by participant during the task

Satisfaction Ratings (1-5 rating)

Statements will be read to the participant or asked as questions via prompts afterwards, who will be asked to give a rating depending on how much they agree with it.

1 = Strongly disagree / 2 = Disagree / 3 = Neutral / 4 = Agree / 5 = Strongly Agree

Follow Up Questions

Targeted questions in relation to the scenario to further understand the users experience in completing the task, with a focus on pain-points and areas of confusion or difficulty.

Moderated v Unmoderated Testing

- Scenario 1 Only (Onboarding) = Unmoderated
 - Recruit 2 organisers for loved ones
 - Recruit 2 organisers for self
 - Recruit 2 companions
- Scenario 1-3 (Onboarding, Booking and Visits) = Moderated
 - Recruit 6 organisers for loved ones
 - Recruit 6 organisers for self
 - Recruit 4-6 companions

4.2 Scenario 1 – Onboarding

Segment A – Organiser (for loved one)

| Segment A | Organiser (for loved one) |
|-------------------|---|
| Scenario 1 | <i>You have an elderly relative who lives a long distance away and you can't visit very often. You think they'd appreciate it if someone could pop around for a cup of tea and a chat for a couple of hours each week.</i> |
| Task | <p>Starting on the companiions website homepage browse the website as you normally would when finding out about a new product or service and navigate to download the mobile app when you're ready.</p> <p>Once you have downloaded the app onto your phone, go through the relevant signup journey and continue until your account and loved one's profile are fully complete.</p> |
| URL | www.companiions.com |

Segment B – Organiser (for yourself)

| Segment B | Organiser (for yourself) |
|-----------------|---|
| Scenario | <i>You're a new mum with a 6 month old baby daughter. Having had the baby during the pandemic you suffered from postnatal depression and have struggled to keep the house in order. You'd really like someone to pop round once a week to watch the baby so you can get on with some housework, have a shower and some me time as well as a nice chat as a distraction from motherhood.</i> |
| Task | <p>Starting on the companiions website homepage browse the website as you normally would when finding out about a new product or service and navigate to download the mobile app when you're ready.</p> <p>Once you have downloaded the app onto your phone, go through the relevant signup journey and continue until your account and profile are fully complete.</p> |
| URL | www.companiions.com |

Segment C – Companion

| Segment C | Companion |
|-----------------|--|
| Scenario | <i>You've decided that you'd love to help out in the community and help to improve loneliness for the elderly. You're also keen to earn some extra cash in your spare time.</i> |
| Task | <p>Starting on the companiions website homepage, browse the website as you normally would when finding out about a new product or service and navigate to download the mobile app when you're ready.</p> <p>Once you have downloaded the app onto your phone, go through the relevant signup journey and continue until your account, profile and availability are fully complete.</p> |
| URL | https://www.companiions.com |

Satisfaction Rating Questions (1–5 rating)

- The onboarding process was simple and the navigation easy to use
- I understood the language used throughout
- The information was displayed clearly and easy to take in
- I understood what was required of me at each step
- I understood why each piece of information was required
- The onboarding process reassured me that the app is safe and trustworthy
- There was adequate support and guidance to help me if I got confused

Follow Up Questions

1. Did you understand the purpose of the app before downloading? What was your understanding of it? What helped you gain this understanding? Was anything unclear to you?
2. Did you view the tutorial after downloading the app? If no, why not? If yes, how informative was it?
3. Was it clear to you which account type you needed? How did you make this decision?
4. Were there any parts of the process that were confusing or hard to complete? Reference any errors made/hesitancy
5. Was there any information that you didn't feel comfortable submitting? If yes, which pieces of information and why?
6. Was there anything within the process that would dissuade you from signing up?
7. After successfully entering your address information, was it clear which aspects of your profile were left to complete? If no, why not?
8. Please describe your thoughts on the homepage and its contents. Once complete, move onto the next step.
9. How did you find the global navigation when moving between the account, homepage and profile sections? Did it make sense? Was there any navigation that confused you?
10. Did you understand what to do next after completing your account?
11. What did you expect to see once your account was complete?
12. Did you feel prepared to book or receive visit requests at the end of the onboarding process? If no, why not?
13. Are there any changes you feel would improve the onboarding experience overall?.

4.3 Scenario 2 – Booking

Segment A – Organiser (for loved one)

| Segment A | Organiser (for loved one) |
|-----------------|--|
| Scenario | <i>You've successfully signed up as an organiser, verifying your account and completing your loved ones profile. You decide you'd like to book a visit from a companion</i> |
| Task | Having completed the signup journey and created a profile for your loved one, go ahead and try to book a companion for a visit today in 10 mins time. Complete the booking process until the visit has been confirmed. |
| Screen | Book |

Segment B – Organiser (for yourself)

| Segment B | Organiser (for yourself) |
|-----------------|--|
| Scenario | <i>You've successfully signed up as an organiser, verifying your account and completing your profile. You decide you'd like to book a visit from a companion</i> |
| Task | Having completed the signup journey and created your profile, go ahead and try to book a companion for a visit today. Complete the booking process until the visit has been confirmed. |
| Screen | Book |

Satisfaction Rating Questions (1-5 rating)

- I could easily browse and find companions who were suited to me
- The booking process is easy to understand
- The booking process is quick and easy to complete
- It was easy to keep track of my visits and any invites I sent to companions
- I would like to be able to edit or delete my visit after it's been created

Follow Up Questions

1. Do you feel you have enough control when browsing or searching for companions? How did you find the experience?
2. Which parts of the companion profile are most important to you when selecting companions to invite? Why?
3. Did you understand how the booking process works before starting? What did you expect?
4. Do you feel the booking process is seamless and pain free? If not, what were the biggest pain points?
5. At what point did you realise the companion had responded to your request? Was it clear?
6. At what point did you realise the visit was confirmed? What is clear?
7. Would you like to be able to confirm a companion after inviting them every time you create a visit? Why?
8. Was there anything within the process that would dissuade you from creating a visit or inviting a companion?
9. Did you feel prepared for the visit to take place at the end of the booking process? If no, why not?
10. Are there any changes you feel would improve your booking experience overall?
11. Would the ability to create repeating visits ie. every week on a monday, be of interest to you?

Segment C – Companions

| Segment C | Companion |
|-----------------|---|
| Scenario | <i>You've successfully signed up as a companion, verifying your account and completing your profile. You're ready to receive visit requests from organisers.</i> |
| Task | Having completed the signup journey and created your profile and availability, view your recent booking requests and go through the process to accept a visit for tomorrow afternoon, until it has been confirmed by the organiser. |
| URL | Book |

Satisfaction Rating Questions (1-5 rating)

- The booking process is quick and easy to complete
- I could find new booking requests with ease
- Managing my booking requests was straightforward
- The visit request had all the information I needed

Follow Up Questions

1. Do you feel you have enough control over the times that you can set your availability for?
2. Would you expect to be able to set any other visit preferences alongside your availability?
3. Which parts of the booking request are of most interest to you when accepting/declining the invite?
4. Did you understand how the booking process works before starting? What did you expect?
5. Do you feel the booking process is seamless and pain free? If not, what were the biggest pain points?
6. Was there any information that you felt was missing or wasn't in the right place at the right time? If yes, please share examples.
7. At what point did you realise the visit was confirmed? What is clear?
8. Was there anything within the process that would dissuade you from accepting a visit request?
9. Would you ever be willing to commit to repeating visits ie. every week on a monday?
10. Did you feel prepared for the visit to take place at the end of the booking process? If no, why not?
11. Are there any changes you feel would improve your booking experience overall?

4.4 Scenario 3 - Visit (During & After)

Segment A - Organiser (for loved one)

| Segment A | Organiser (for loved one) |
|-----------------|---|
| Scenario | <i>You've successfully found a suitable companion and booked them for a visit with your loved one, which has been confirmed and taking place today. The companion has arrived and the visit is about to begin.</i> |
| Task | With the visit about to begin, check to ensure the companion has checked-in successfully. At the end of the visit go ahead and confirm the check-in & check-out times are correct before completing the post-visit steps in your app. |
| Screen | Visits |

Segment B – Organiser (for yourself)

| Segment B | Organiser (for yourself) |
|-----------------|---|
| Scenario | <i>You've successfully found a suitable companion and booked them for a visit which has been confirmed and taking place today. The companion has arrived and the visit is about to begin.</i> |
| Task | With the visit about to begin, check to ensure the companion has checked-in successfully. At the end of the visit go ahead and confirm the check-in & check-out times are correct before completing the post-visit steps in your app. |
| Screen | Visits |

Satisfaction Rating Questions (1-5 rating)

- The visit process was simple to follow in-app
- Communication with the companion was easy to access
- I had all the information I needed to review and approve the visit
- I fully understood the cost breakdown of the visit
- The post-visit process was easy to follow and clearly signposted
- Leaving a review was easy and straightforward
- It was clear to me when the review process was complete
- It would have been easy to report an issue if I'd had one
- It would have been easy to book another visit with my companion if I wanted to

Follow Up Questions

1. Did the information in the visit summary make sense? Was there anything you didn't understand?
2. Was it clear to you when the companion had checked in and out?
3. Were the steps required to approve the visit and confirm payment clear and easy to understand?
4. Did the visit summary have all the information you needed to approve the visit? Was there anything missing?
5. Was it clear to you what to do after you had confirmed payment?
6. Was the review form easy to complete? Was there anything missing that you expected to see?
7. Was it clear to you when the post-visit flow was complete?
8. Was there anything missing from the post-visit flow?
9. How likely would you be to want to book another visit once this one had finished?
10. Was there anything within the process that would dissuade you from booking another visit?

11. Are there any changes you feel would improve the in-app visit experience overall?
12. Are there any changes you feel would improve the post-visit experience overall?

Segment C – Companions

| Segment C | Companion |
|-----------------|---|
| Scenario | <i>You've accepted a visit request from a local organiser. The visit has been confirmed and taking place today with their loved one. You've arrived at the visit location and the visit is about to begin.</i> |
| Task | With the visit about to begin, read the visit details page to ensure you have all the information you need before it starts. When ready, check-in to begin the visit. At the end of the visit, go ahead and check-out before completing the post-visit steps in your app once the organiser has approved timings and confirmed payment. |
| Screen | Visits |

Satisfaction Rating Questions (1-5 rating)

- The visit details page had all the information I needed before the visit started
- I felt prepared to start the visit when the time came
- Communication with the companion was easy to access
- The check in/check out process is easy to understand and use
- It was easy to edit my check in/check out times at the end of the visit
- I understood when to expect payment after the visit had ended
- The post-visit process was easy to follow and clearly signposted
- Leaving a review was easy and straightforward
- It was clear to me when the review process was complete
- It would have been easy to report an issue if I'd had one

Follow Up Questions

1. Was there any additional information you would like to be able to access before the visit was due to start?
2. Did you find the checking in/out process easy to operate? Did it work as expected?
3. What did you expect to happen after you had checked out and the visit had been completed? How did the actual process compare
4. Did you feel confident the organiser would approve your visit?
5. Was the review form easy to complete? Did it make sense? Was there anything missing that you expected to see?
6. Was it clear to you when the post-visit flow was complete?

7. Was there anything missing from the post-visit flow?
8. Are there any changes you feel would improve the in-app visit experience overall?
9. Are there any changes you feel would improve the post-visit experience overall?

4.5 Testing Scripts

Unmoderated Tests

<https://docs.google.com/document/d/1lwHsB8DSOx9uZS1RRUT2CN11YCK88r21Lu9vF05Iitl/edit#>

Moderated Tests

<https://docs.google.com/document/d/1Zy4P8-B48a3FQARg2zp-w4php3rMy3-efqFuRNx4YRg/edit#>

5. Focus Groups for Market Research

Focus groups should be a moderated discussion typically involving 5 to 10 participants who are current/existing users of the app. Through focus groups, we should learn about users' attitudes, beliefs and desires across usability and performance, interaction design and content understanding.

5.1 Approach

The proposed approach is to run 3 focus groups:

- Companions
 - companions who are our best supporters
 - companions who feel ambivalent about the product or have had issues
- Organisers who are organising for themselves
- Organisers who are organising for a loved one

Action: The details of how the focus groups will be organised, recruited for and run is a topic for discussion w/c September 6th.

5.2 Question Topics

1. Is there an awareness of the brand/company and what the app does before downloading?
2. Who would they assume are our competitors?
3. Is there an understanding of how the product/service works before download?
4. Is the messaging on the website/app suitable and effective?
5. Does the app feel safe and trustworthy? Does it do enough to create trust throughout?
6. What factors influence people's engagement during onboarding?
7. What factors influence organisers decisions to create visits and invite companions?

8. What factors influence companions' decisions to accept/decline visit invitations?
9. Does the app adequately support the visit before, during and after it takes place?
10. At what stage in the process would organisers be most likely to book another visit?
11. Do users feel supported and able to access help/log issues throughout?
12. Are there any major pain-points of the app that need addressing?

6. In-Depth Interviews

The goal of in-depth interviews should be to find out how organisers use the visit booking section, what they feel works well, where they think there are issues, and how they think things could be improved.

In-depth interviews will follow on from usability testing and will be arranged as required when we are doing discovery work on specific areas of the user journey. Since general interviews are already being conducted, there is not a specific plan for additional interviews to take place in September.

6.1 Preferred Methodology

These are one on one interviews with existing users in order to probe in more depth about their particular experience. Questions are structured around the experience they had and replaying their journey.

1. Probing questions and nudges such as those listed below should be used to extract insight from the participants.
2. Interviews can be done using a user testing platform or Google meets or Zoom, depending on the specific recruitment needs and cost.
3. If using Google meets or Zoom, Capture feedback using the usability testing form: <https://docs.google.com/document/d/1eMTQGxGiqPEA2g3ABtymWYw6k4lga9Gp5jCo3lhly9c/edit?usp=sharing>

6.2 Example Questions

1. Think for a moment about when you went to start booking a visit..
2. How did you start the visit booking process?
3. Could you find your way to it immediately?
4. Was anything unclear?
5. Was it easy and straightforward to choose a date and time?
6. Did choosing a date/time to begin with make sense?
7. Did you see companions based on your search criteria?
8. Did you try a few different searches?
9. What did you think of the companion profiles?
10. Did you have a feeling of trust about them?
11. Were you hesitant about booking them for any reason?

7. Data/Analytics

Prior to the usability testing, it should be verified that the data and analytics platform are capturing the right information to enable in-person learnings during the session to be corroborated and supported with data.

This may need data/analytics capture dev work to be carried out in advance.

Action: Rob and Adam to walk through data studio and identify the events at key places in the user journey. Events and corresponding user journey screens will be documented and linked to here.

8. Envisaged Testing & Improvements Process

Outline of the key stages required to follow this research plan from user testing through to implementation of identified improvements; including the resources needed for each step.

1. User testing (usertesting.com / userlytics)
2. Review data in testing platform
3. Translate key data to external source for affinity mapping (miro?)
4. Cluster data into themes/the three primary scenarios (onboarding, booking, visits)
5. Prioritise themes (based on importance/time available/relative impact etc)
6. Identify improvements in response to each theme
7. Design improvements and review iteratively within an interactive prototype (figma)
8. Test new designs to establish improvements (A/B testing? Repeat parts of UT)
9. Implement approved updates

Test execution preparation

9. Full User Testing Logistics

Onboarding - Unmoderated

1. Sign up for account
2. Account verification - *blur out personal info*
3. Complete profile
4. Complete account - *user can use own payment info*

5. Finish

Bookings (Organiser) - Moderated

1. Sign in to pre-loaded account
2. Create visit
3. Browse companions
4. Add companion to shortlist
5. Invite shortlist
6. Moderator responds to invite
7. View companion responses
8. Select companion and confirm
9. Visit confirmed
10. Finish

Bookings (Companion) - Moderated

1. Sign in to pre-loaded account
2. Moderator invites companion to a visit - *moderator using organiser account in same geography as participant*
3. Companion receives invite and accepts
4. Moderator confirms visit
5. Visit confirmed
6. Finish

Visits (Organiser) - Moderated

1. Sign in to pre-loaded account - *with pre-loaded payment card details*
2. Moderator checks in to a visit - *moderator using companion account in same geography as participant*
3. Organiser views check in time
4. Moderator checks out of the visit after 1 min
5. Organiser views check in/out times and duration
6. Tap approve times
7. View visit summary
8. Confirm payment
9. Review companion
10. Submit review
11. Finish

Visits (Companion) – Moderated

1. Sign in to pre-loaded account – *with pre-loaded bank details*
2. Check in to a visit
3. Wait 1 min
4. Check out of the visit
5. Moderator views check in/out times and duration – *using companion account in same geography as participant*
6. Moderator approves times
7. Moderator confirms payment
8. Review companion
9. Submit review
10. Finish

Test Accounts & Payment Details Needed

Scenario 1 – Onboarding (Unmoderated)

- Both Companions and Organisers can create accounts from initial download

Scenario 2 – Booking (Moderated)

Organisers

- Participants to be given bank account details to update on profile