Usability Brief

During the Discover stage several tasks are carried out with the goal of establishing *usability requirements* for the site.

The purpose of a Usability Brief is to document the data collected during these tasks, and to document the key usability goals for the site user interface which emerge from an analysis of this data.

The following sections document the User Profile, Usage Environment and Content/Task. User focus groups were not possible in the early stages of this project, so the following conclusions are based on discussions with EGF staff and questionnaires that were sent to prospective users.

User Profile Data

On this project the pool of prospective users was not made available to the design team because they were too busy and viewed as potential competitors in the web space. Information was gathered second hand from the EGF team and first hand from a questionnaire.

Since this is a relatively small pool of people (approximately 40 in the first year) the following general observations can be made:

- The level of experience using traditional software applications seemed to range from “low” to “moderate”
- The level of Web experience is deemed “low”
- The current need/desire to look up business information on the web is currently unknown and most likely will remain unknown due to the lack of access to the pool of prospective users.

General Inferences

- High level of education/intelligence/reading level
- Low level of computer/Web experience
- All users are to be considered experts in their field, highly trained and knowledgeable
- Very busy, low level of patience
- Narrow age range, from 40s to 50s
- Native Language: English, for first round no business will be conducted in a language other than English
- Mostly women
- Relationships between traders is dependent on trust. Projected relationship between traders and EGF will also depend on a high level of trust.
- High need for privacy in some market situations. (Identity of some traders can affect the price of securities and can also alter long term strategies)

Usage Environment Data

The user environmental data is taken from discussions with EGF staff, who was confident their model of the user environment would be accurate enough to move forward.

The user questionnaire was also used to gather technical environ data.

- Technology platform:
  - The majority work with Windows 9x desktops
- All users will have access to their own workstation. No shared workstations.
- Most are connected to the Internet via high speed LAN, however due to traffic constraints and other factors, EGF (Cory) felt we should design with 56k speed as the standard for download times. In addition some users will be using 33.6 modem speeds when they login from home.
- Usage environment:
- The users' working environment is mainly at offices and home offices

- Cultural usage environment:
- Highly competitive
- Currently most negotiation is done over the phone, one on one.
- Small number of trusted information sources
- Trust between members on trading is assumed. Traders keep lists of people they will not trade/communicate with based on past experience
- Moderate level of interruptions
- Heavy use of financial jargon, even more specifically to private placement jargon
- Very high need for credibility of information

- Physical usage environment:
- Unknown

Task Data

- A set of **task scenarios**, or real life work situations that describe the context in which the site would be used and the workflow within individual tasks. (Task scenarios are in a separate document)
- **General observations** regarding the work the site is intended to support, including such things as range of task complexity, complexity of business rules involved in user tasks, typical errors, general bottlenecks in current work processes etc. (these will be gathered as the interface is designed and refined)

USABILITY GOALS

Qualitative Goals

All the usability requirements data gathered and documented in the above sections point to the following usability goals which must be addressed by the design of the site user interface to achieve maximum usability for these users doing the specific tasks supported by the site.

Provide low learning curve.

This group of users customarily conducts its business over phone lines and only occasionally uses the web for research. One of the highest priorities for this web site is to create a process flow that closely parallels the real life process flow of a loan origination or a sale/purchase of a security. The closer the web site resembles the normal flow, the more users we will convince to use the web instead of their more traditional means.

To ease this transition, the web site must be built with the lowest possible learning curve in mind. Help must be available at every step, all key phrases/ navigation terms must be vetted before implementation.

Establish credibility.

The users of this web site will rely on it for timely and accurate information in order to secure multi-million dollar deals. It is therefore imperative that the web site maintains the highest levels of professionalism and accuracy. In addition it is important that EGF shows a neutral stance on the market and the people involved in the market.

Accurate information delivery

This particular market has a mountain of information on which it can draw. The danger to users isn't a lack of information, but an overflow of useless information. It is therefore critical that information presented to the users is pinpointed to their needs. A long list of user preferences must be gathered and used to direct information accurately. In addition, user tracking may become a tool needed to deliver the right information to the right people.

Maximize succinct information display.

This web site should use summary pages and 'digital dashboard' techniques to provide all the pertinent information required for a user to make a decision. This will eliminate the need for users to recall data from one page/view to another.

Support need for privacy/anonymity.

In some cases (for example a large Institutional Investor wants to sell a security) privacy is critical. In some cases, if a seller's identity is known, it will affect the bid on a security.

Furthermore, no trader will want to give hints as to what they are thinking for future trades/actions. Therefore, privacy and anonymity are critical to the survival of this trading platform.

Support interrupts and distractions.

The users of this web site are assumed to work somewhat online and somewhat in real space. Therefore it is important that any screen in a defined work flow must be easy to recognize and reidentify so that the user can easily pick up the trail of where they were in a specific process.

Provide powerful search capability.

The users of this web site will need to search on a number of different data types. They must be able to find specific securities, cull out securities by performance, find informational articles, and other elements.

There will have to be several search pages or several categories in a single search engine.

Support integration information tangents.

Users of this web site will need multiple informational sources on a particular deal or company. Therefore it is important that informational tangents are supported and built into key web screens.

Support use of multiple workstations.

The web site users may want to work from an office and from home, so we have to support multiple workstations.

Quantitative Goals

The above goals are *qualitative*, and will be used to drive user interface design during this initial project.

During usability testing on this project, we will gather feedback from test users that will help us turn some of these qualitative goals into *quantitative* goals. These goals could then be used in later projects to further develop this site, to further iterate the user interface design towards optimal usability.

Qualitative goals from the previous section which are good candidates for later development into quantitative goals, and possible metrics for those quantified goals, include:

Performance Goals

- ❑ Provide ease of learning
  - Number of errors on first encounter
  - Time to complete task on first encounter
- ❑ Accurate information delivery
  - Number of unneeded pages in a session
- ❑ Succinct information display

- Time to scan and find key information
- Number of clicks from home page needed to complete task

❑ Support Multiple workstations

- Test login on two or more workstations for same user

Satisfaction Goals

❑ Establish credibility

- Feedback prior to and after launch

❑ Support need for privacy

- Feedback prior to and after launch

❑ Support interrupts and distractions

- Feedback prior to and after launch