



Hybrid Media Buy Campaigns Usability Test Report

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Dish BrandDrive Test Group

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SproutLoud's UX team conducted remote usability testing from March 21st and March 28th, 2017 on prototypes of the new Hybrid Media Buy Campaign feature. This document outlines the tests that were conducted with the Dish BrandDrive group. The following report documents our methodology, findings and recommendations.

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:: Executive Summary

Overall the Hybrid Media Buy Campaign (HMBC) feature was well accepted and tested users felt that Sproutcloud in moving in the right direction with its development. Subjects were particularly pleased with the way the feature places all important campaign information in one location. Despite the benefits, our tests revealed that there is much to be improved in the current designs. Issues include:

- Confusion between campaigns, orders, and payments
- Might be hard for new users to find campaigns
- Users want multi-tactic campaigns
- Budget section could be redesigned to be more Intuitive
- Timeline section could be simplified to be more intuitive
- We need to include more explicative text and clearer calls to action
- Ecommerce-type patterns at the end of flows were disliked

:: Testing Objectives

The study reviewed the usability of the Hybrid Media Buy Campaign (HMBC) prototype by examining how users performed the following tasks:

Core tasks

- Locating the new HMBC feature
- Swapping an Item on Existing Campaign
- Create New Campaign for Reimbursement (in the context of a campaign)
- Submit Claim from Manage Campaign Actions

Additional tasks

- Find Upcoming and past payment details
- Knowing which items are currently running

:: Methodology

All sessions were remotely moderated and recorded by the UX team via join.me. [\[Link suppressed\]](#) Users were sent a link to the prototype [\[Link suppressed\]](#) and then asked to complete the tasks above. Each session was time boxed to one hour.

Since tests were performed on a prototype, users were guided throughout the study. This was also done so that we could gather feedback on the newly added functionality and bypass other steps that were not in scope for adjustments. Task completion was not used as a form of measure in this test and higher weight was given to qualitative data and user feedback.

:: Tested Content

The prototype was designed according to key stakeholder requirements. It also incorporated feedback from the Sproutloud client services team. The prototype was then developed in Invision to provide an interactive experience for the test.

:: Participants

Sessions were conducted with 8 DishBrand Drive sub-accounts and distributors. Each participant was selected as a likely candidate for the new HBMC feature. Each had already gone through a brief product introduction and had varying experience with the SproutLoud application.

Account	Company	Name	Title
BC14700002782448	Genex Electronics	Stephanie Oliver	Retailer
BC14700002784576	Future Vision Enterprises	John Dawson	Retailer
BC14700002789123	Channel Choice	Garrett Balenmacher	Retailer
BC14700002791877	Young Ideas	Gary Young	Retailer
BC14700002794882	IBB Electronics	Jay Johnson	Distributor
	IBB	Ben Jenkins	Distributor
BC14700002799127	MS Systems	Crystal Lee & Carrie Lefebvre	Distributor
	Custom Distribution	Tammy Berke	Distributor
BC14700002801711	Mid State Distribution	Kathy Kessel & Phil Fields	Distributor

Full participant details found here:

[\[Link suppressed\]](#)

:: Key Findings

The following document outlines some of the most prominent similarities in users' reactions:

[\[Link suppressed\]](#)

Video Highlight Reel available here:

[\[Link suppressed\]](#)

:: Recommendations

Finding: Users expect to be able to start a campaign during the catalog checkout flow. They admitted that this was because they were accustomed to how the application is currently set

up. This highlights how power users have become accustomed with the current application structure.

Recommendation: While this is good news for HMBC workflows it reminds us that we will need to be very careful when rolling out the global navigation update. A proper release strategy will have to be made to accommodate for existing users in the platform.

Finding: Users expect find existing campaigns by clicking Account & Orders > In-progress. Once on the Account & Orders page users tend to filter out all additional links and go straight for the "In-Progress" link.

Recommendation: Make sure campaigns accessible from the in-progress link. Other links in the right column could be removed to reduce clutter. Additional tests needed to see if this flow is intuitive for new users since many admitted their actions were based off experience with the application.

Finding: Even after being introduced to the HMBC concept, there was confusion with the difference between orders, campaigns and vendor payments. This could be even harder to those who discover the feature without any background on the subject.

Recommendation: We'll need to provide a roll out plan detailing the difference and benefits of the new feature. This should also highlight what campaigns can and cannot do. We also suggest adding help text on the campaign creation step and well as in the campaign itself to help describe it.

Finding: Customers would like to manage multiple tactics under one campaign shell. Their mental model of a campaign includes multiple channels and media types.

Recommendation: Next iteration of the HMBC should allow users to group items from different tactics together.

Finding: Users are generally pleased by the manage campaign area. Overall users want their information stored and easily accessed from one place.

Recommendation: Explore taking this same concept to the application by providing some sort of global notification area.

Finding: The milestone tab was received with mixed reviews. Some really liked it and others did not understand it or see its usefulness. Comments suggested that showing this information on a regular calendar would be much easier to understand. Overall reverse chronological order was counter intuitive. Users also expected to be able to take action from the individual items that were displayed in the timeline.

Recommendation: Consider redesigning this to a calendar layout. See suggested redesign here. [\[Link suppressed\]](#) If we do choose to move forward with design, additional explanation text needs to be provided about what it is. Likewise, the timeline should be presented in chronological order by default and more details on how to switch between chronological directions.

Finding: Although the graphs are helpful and generally well received, there were comments that this section is not designed the way retailers think. Users are accustomed to accounting software when dealing with moneys, so a similar layout might be better suited.

Recommendation: Consider losing the graph and displaying this info in a line-item type layout instead. See suggested redesign here. [\[Link suppressed\]](#)

Finding: Users want to be able to adjust budgets/funds from the manage campaign screen.

Recommendation: Provide links on budget widget to make adjustments. Ideally this would be a modal window or similar treatment to keep the user in context of the campaign.

Finding: Users think they can swap campaign items from the (green) campaign actions button. The "Request changes" campaign option was seen as an appropriate way to do this.

Recommendation: Explore adding a swap action on the campaign level or a way to make it clearer what the "Request Changes" should be used for. Additionally, consider making items more visible on the main screen.

Finding: Users had trouble locating the tabs in the prototype because they often fell below the fold in the users' browser.

Recommendation: Reduce vertical height of homepage graphs or redesign the layout so that the tabs are more visible. Suggested design [\[Link suppressed\]](#) solves this issue.

Finding: The term "items" was confusing for a majority of users. When inside a particular campaign type, they expected the items to be referenced for what they really were i.e. "scripts" while in a radio media buy campaign.

Recommendation: Update what we call items depending on the campaign type.

Finding: There is some confusion with the term "Swap" and other generally named links in the actions menu.

Recommendation: Explore using more explicative verbiage whenever possible. If a general term is necessary there should be a tool tip, design element or additional info to clarify things to the user.

Finding: Users like the bar at the top of the swap/add item flows

Recommendation: Consider adding this to the pattern library to use for similar experiences that come up in the future.

Finding: Some confusion on what the Edit button does on confirmation page of the swap flow.

Recommendation: Add info text or more explicative call to action on the edit button or redesign the page to make it clearer what the button is editing. See suggested redesign here. [\[Link suppressed\]](#)

Finding: Users do not like the ecommerce-type experience at the end of the campaign flows.
Recommendation: Remove related items at end of campaign adjustment flows. Replace "Continue Shopping" text with "Return to Homepage" or another general link. Explore where else this is currently happening in the application and consider an A/B test to see if this should be a universal update. See redesign here.

Finding: There is some confusion in the payment tab area.
Recommendation: Add information about how payments are handled and what items they are associated with.

Finding: Displaying the cost associated with the "We will do it for you" option was very distracting for users. When they arrived at this screen they fixated on the price over anything else.
Recommendation: Consider hiding this option from the user or adding it in the learn more pop-up on this screen.

Finding: When starting a DIY campaign, retailers rarely know their start or end dates. These fields may cause friction with retails. Additionally, after dates are collected at the start there is no functionality to edit these dates after campaign has started.
Recommendation: On DIY make these fields optional. Allow the user to update dates on items grid.

Finding: Naming campaigns correctly is a known issue for most users.
Recommendation: Provide suggestions on best naming practices during setup to help solve this issue.

Finding: Users want to easily view the script or creative on the confirmation page to make sure they are certain they know what they are getting.
Recommendation: Redesign the review your campaign page to show script/creative inline.

:: Conclusion

Overall the new HMBC feature is headed in the right direction since users want to access all their information in one place. Some of the most critical feedback came from distributors who want fewer and more intuitive steps in the campaign management process. Additional usability gaps in the prototypes can be addressed immediately by redesigning the current screens and providing more explicative text throughout the HBMC feature. This usability study also revealed that there are discrepancies between the designs we create using feedback from proxy users (CRMs, MAs, etc.) and actual end users. The more direct information we can collect up front with real users the better designs we can create in the future.

:: Appendix

:: Usability Test Scripts

Introduction

- Make sure test is being recorded
- Introduction and thank you

- (To give you a quick refresher) this new functionality will let you group several media buy order items together and manage them. It also gives you the flexibility using your own vendors or doing it entirely within DishBrand drive platform. Basically, what we are trying to do is simplify the whole process and make things like swapping creatives and submitting reimbursements, much easier than the current methods. Multiple orders with the same vendor.

- So today is the next step to our original focus group regarding this new feature. What we are going to be doing, is have you walk through a few scenarios so we can identify areas where we can improve the experience.

- Before we start I want to remind you to be completely candid with your feedback. I did not design these upcoming screens. I am only here to present them on behalf of our team. So please don't be shy to share any comments or to be critical of any parts.

- You will not hurt my feelings— instead, you will help us improve the new feature. Likewise, there are no right or wrong way answers here. This is instead a time for us to learn about your needs.

- I also want to let you know that what you will be interacting with is a prototype- not the real application. Therefore, there may be some features that are not available in this demonstration. We will be here to guide you when those types of situations come up, so we just ask that you imagine play along.

- Lastly, but most importantly during the whole process we want you to think aloud. That is, say out loud what you are thinking in your head while you are navigating the application. Whenever you click, please announce what you expect to happen or where it should take you.

- Before we start do you have any questions for me?

Great so now we will be passing presenter rights over to you as well as a link that we'll need you to navigate to:

[\[Link suppressed\]](#)

Moderator notes: *If the user does not finish their task probe deeper about what may have caused the issue. If the user is stuck, try to uncover what may have lead to task failure.*

Test Group 1 - Core Tasks

Task: Locate the new campaign feature

Have the user start from the home screen

- Ok so what we are going to be doing in the first task is talk about how you think you could create a new media buy campaign and where you think you could access existing campaigns. Without clicking just explain what you're thinking.

If user only mentions one area to look

- What other ways do you think you could start a media buy campaign?
- So if you could click (Orders & Account) to proceed with how you would view an existing Radio Media Buy campaign.
- Go ahead and click "All Campaigns".
- Does everything here look as you would expect?
- Go ahead and click into the Radio media buy campaign.
- What is your initial reaction to this screen? What stands out to you?

Action:

- Manage Campaigns → Radio Ad 1 - View Campaign
- Without clicking anything explore the page with your mouse. Describe what you see and what you think you can do in more detail.
- What seems most and least useful to you on this screen?
- Is there anything on this page that is unclear to you? Or do you feel like anything is missing?

Task: Swapping an item within an existing campaign

Have the user navigate to slide 27 (campaign management screen).:

[\[Link suppressed\]](#)

Let the user to look at the first screen for a few seconds.

- Ok so our next task is based around swapping an item that is currently running in this campaign.
- Please show us how you would swap a currently running item in this campaign with a new creative.

Action:

- Manage Media Buy Campaign → Items tab
- Items tab → Actions dropdown on 1st item
- Actions dropdown → Swap

Once user gets to the modified catalog for swap.

- Is this what you expected when you clicked swap.
- Let us know if anything is confusing or could be improved
- Please continue with swapping the creative.

Action:

- Catalog Items List → Radio Ad
- Radio Ad → Customize
- Customize → Continue
- Campaign Coordination → Continue
- Campaign Summary → Swap Item
- Swap Item Success → Continue Shopping

Once user completes task

- That completes the task.
- Overall how do you think that went?
- Do you have any comments before we move on?

EXTRA CREDIT

- Where on this screen do you think you would find upcoming and past payments details for the last campaign you were in?
- How would you determine which items are currently running?

- Ok, this completes the task portion of the usability test. Next we're going to ask you a few closing questions before we sign off.

Test Group 2 - Core Tasks

Task: Starting a DIY campaign for Reimbursement

Have the user move to slide 10 of usability test.

- Now we're going to walk through setting up a new Radio Media Buy campaign. We're going to imagine that you have a tight deadline so you're really just looking to find a script and that you will then work with your own vendor to execute. Knowing that you would like to get reimbursed later, you're going to set up a new campaign and get your files. So, keeping this scenario in mind, and without clicking yet can you explain how you think you would begin this process?
- Ok cool. So, for sake of time I'm going to guide you to a specific screen that we're looking for feedback on. Keeping the scenario in mind, let's continue through the catalog and customization steps. Hopefully this gives you a little context to where you are in the application.

Action:

- Catalog Item Detail Page → March Promo Radio Ad
- March Promo Ad → Customize
- Customization → Continue

If the user cannot locate the button on the Campaign Coordination page

- Ok now that we've arrived at this page, and remembering to think aloud, please show me how you would proceed. Be sure to comment if there is anything that stands out to you or if anything.
- There are a few parts like these inputs won't work as expected so please just click wherever needed and continue playing along.

Action:

- Campaign Coordination → Create New Campaign
- Create New Campaign → Do It Yourself
- Do It Yourself → Enter Campaign Details
- Enter Campaign Details → Create Pre-Approval
- Create Pre-approval → Continue
- Campaign Summary → Create Campaign
- Create Campaign → Manage Campaigns

Once user navigates to campaign management screen

- Did this take you to where you were expecting?
- Can you explain a little more what's going on in this screen?
- Ok well that completes task 1
- Thinking of the whole process did everything seem in line with what you would expect? Is there anything that stood out?

Task: Submitting a claim for a campaign

Have the user return to slide 72 (Manage Campaigns Screen)

- Ok so now let's imagine that you want to check out a currently running campaign. Go ahead and click into one.

Action:

- Manage Campaigns → Radio Ad 2 - View Campaign
- Great work.
- Now from this screen can you explain what's here and if there is anything that is confusing?
- Ok so for your next task imagine that you wanted to submit a claim for an individual item in this campaign. And that you want to do this with a pre-approved item for this campaign. Could you show me how you would do that?
- Is there any other area of the page here where you think you might be able to submit a claim for this campaign?
- Go ahead and proceed (with clicking the campaign actions button) to file a claim.

Actions:

- Manage Media Buy Campaign → Campaign Actions
- Campaign Actions → Submit Claim Request
- Ok now show us how you would add a pre-approval.

When the person gets to the pre-approval modal window

- So imagine that you already selected one item and continue by clicking apply changes.

- Again, browse this screen clicking items where you think you would make inputs. Let us know if anything is unclear or unexpected. Continue through submitting your claim.

Actions:

- Create Claim → Select Pre-approval
- Select Pre-approval modal → Apply Changes
- Create Claim (Claim Details) → Claim Name
- Create Claim (Invoice Details) → Vendor Name
- Create Claim (Claimed Amount) → Total Claimed Amount
- Create Claim - Submit Claim

Once user completes task

- (After submitting your claim) did you end up where you expected?
- That completes task 2.
- Overall how do you think that went?
- Ok, this completes the task portion of the usability test. Next, we're going to ask you a few closing questions before we sign off.

Ending Questionnaire

- What parts of the new HBMC stood out to you the most and why?
- Do you feel like these new features will improve your media buying process?
- If you could change one thing (if any) what would it be?
- On a scale from 1 to 10 how would you rate the overall ease of use?
- On a scale from 1 to 10 how likely would you recommend this new feature to a friend or colleague?
- Is there anything else you would like to share with us or any closing thoughts?

Conclusion

Thank you for taking the time to participate with us today. As we have mentioned at the start your feedback will help us improve the application. If there is any additional feedback that comes to mind, don't hesitate on sending an email our way. Otherwise, thanks so much for your help.

:: Additional Notes

Please see link to folder with all video recordings and session notes.

[\[Link suppressed\]](#)