

OPS user research plan: View a CAN

Round 2: June 2022

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Research plan

Goals

- Research goals
 - Document the most common scenarios in which a user would log into OPS and view the CANs they manage (Division Director, Deputy Division Director, Team Lead)
 - Identify whether the info displayed on this page would allow a user to accomplish the tasks they need to
 - Identify gaps in the information we plan to provide
 - Explain how the info on the page would be used by different users
 - Identify potential changes to our current designs
 - Distinguish what information should be available on the main view vs. accessible via download, links, etc.
 - What would you want to know for date/status/5 year view? Anything you need to see?

Method/Format

- 30 minute 1:1 sessions
- Video call to allow screen sharing
- Open prototype in Chrome browser
- Allow users to click through a prototype and give feedback
 - Keep, throwaway, anything missing? Filter views - contracts budget lines - what is the point of this list - what do you want to be able to do? Filter? See more info?

Participants

- 3-4 CAN Leads
- All 4 Division Directors
- Participants from last round: [+](#) OPS Research session scheduling

Timeline

- 1 week to recruit/schedule
- Conduct sessions over the course of 1-2 weeks
- 1 week for analysis / synthesis

Materials

- [Figma prototype](#) (Instruct participants to open in Chrome)

Research protocol

Before session

- Get link to [Figma prototype](#)
- Set up [notes doc](#) and confirm notetaker
- Check if they participated in [PA research](#) or [previous CAN research](#) and if so, read notes, copy any relevant notes to the research notes doc, including their introduction

Introduction / Session framing

- Welcome
 - Thank you for taking the time to talk with us today! It's been a while since our team last reached out and we're excited to share some updates and get your thoughts.
 - [Introduce self and others on the call.]
 - Confirm audio is working well
- Session framing
 - *Project:* As I believe you know, the 18F team working with OPRE has been focused on helping to identify a vendor to work on building OPS longer term, so we paused our design and research work for several months.

- *Current phase:* As we prepare to transition our work to a vendor, we're conducting another round of research to validate some of our findings and package them so that they can be refined by the next team.
- *This session:* This is a direct follow-up to the sessions we conducted in November of last year. We have come up with a new round of designs based on the feedback we collected then.
- Format & documentation
 - Over the next 25 mins, we would like you to review a new design for a CAN page.
 - In order to do this, we've created an updated prototype. Like the last round of wireframes you saw, this is still a work in progress and just designed to help elicit feedback. This prototype is clickable, but it's not a real website, so not everything will work the way you'd expect. We're using this to give you the ability to navigate the page and respond to the design.
 - We will share the link with you and ask you to share your screen and then give you prompts and ask you questions. Please note, these are still *very early designs*. Everything is still up for discussion. The more candid and direct you can be with your feedback the better. Don't hold back!
 - We will also be taking notes.
- Questions
 - Let us know at any point if you have any questions or concerns or if you need to end the session.
 - Do you have any questions for us or anything we should know before we dive in?

Prototype explanation/instructions

- I have just pasted the link to the prototype in the chat. Please open that link in Chrome and share your screen.

Questions/Prompts

Research questions

- Can you tell us a little bit about your responsibilities as they pertain to CANs?
- What tasks would you use this page to accomplish?
- What do you want to be able to see at a glance vs. navigate to further details?
- How do you understand the contents of the Budget Summary section?
 - Ask users to interpret labels/headings
 - What tasks would the budget summary section help you accomplish? Can you provide specific examples of when/how you would use it?

- How do you understand the contents of the Contracts/Budget Lines section of this page?
 - Questions for all columns:
 - How do you interpret this column heading? What do you think this is? Do you have an alternative suggestion for what to call this?
 - Do you want this info at a glance, or would you only need it for more detailed work?
 - What tasks would this information help you accomplish?
 - How would you want to be able to sort/filter this information?
 - Questions about individual columns:
 - Contracts: Is this how you would expect to see the contract name? When would you want to click to go to the contract page?
 - Budget lines: Would you want to see all budget lines, or just the ones funded by this CAN? Would you want to see these on this page, or not until navigating to a more detailed view of the contract? Are there other things about budget lines you would want to see at a glance?
 - \$: Do you want to see the total amount the contract is worth?
 - %: Is it useful to see what percentage of the full contract this CAN is responsible for funding?
 - Other funding sources: Would these ever be things other than CANs? Useful? How many max would you expect?
 - Research areas: Is this the terminology you'd use? Are there other attributes of contracts you'd want to see?
 - Point of Contact: Who would you expect this to be? Is this useful info to have at a glance?
 - Date: Would it be useful to see something timeline-related? If so, what sort of date would be relevant?
 - Status: Would it be useful to see a status? What kind of status?


Wrap up

Thank you so much for your time today! This has been really helpful.

- Is it okay if we follow up with you if we have any questions when we review our notes
- Would you like to be included in future rounds of research?
- Any questions or comments for us?

Recruiting

Approach

- Shared research plan and identified appropriate participants in collaboration with Product Owner and Executive Sponsor: CAN Leads, Division Directors, and Deputy Division Directors
- Product Owner told them to expect an email from 18F to participate in sessions
- Emailed initial message to entire group
- Plotted responses in a spreadsheet ( OPS Research session scheduling) and assigned to maximize the number of participants and ensure we didn't have too many sessions each day
- Sent calendar invitations with Google Meet video conferencing links
- Sent follow-up messages to confirm invitations were sent and to thank participants

Communications

- Initial outreach message (below)
- Reminder day before deadline to send availability
- Thank you to all day after deadline confirming that invitations have been sent
- Thank you to all participants after sessions were conducted

Good afternoon,

My name is Julia Lindpaintner, and I'm reaching out on behalf of the 18F team supporting the work to design and develop OPS, as Sheila promised. You're receiving this invitation to participate based on your experience managing CANs. We would like to schedule 30 minute 1:1 sessions in the next couple weeks to show you some preliminary designs and learn more about what would assist you in your work. We're hoping to speak to folks from across all divisions.

We may not be able to speak with everyone in this round, but rest assured that there will be more opportunities in the future. If you are willing and able, please reply indicating all of the times within the following windows that you might be available. We'll look at responses and try to accommodate as many sessions as we're able to.

Week of November 8

- Tues 11/9 1-3pm ET
- Wed 11/10 12:30-1:30 ET

Week of November 15

- Mon 11/15 1-3pm ET
- Tues 11/16 10-11:30am ET and 1-3pm
- Wed 11/17 10am-12pm ET
- Thurs 11/18 10-11:30am ET
- Fri 11/19 1:30-3pm ET

Many thanks in advance for your participation!

Julia

Synthesized learnings

Takeaways for future iterations