

# **UX Research Plan [Usability Study]**

## **Introduction**

- Title: Conduct a Usability Study
- Author: Anjali Trivedi, [anjali.trivedi@bnymellon.com](mailto:anjali.trivedi@bnymellon.com)
- Stakeholders: Project X Users
- Date: 11/4/2022
- Project Background: The workspace is currently being used as an internal application for users to communicate with clients
- Research Goals: identify all major pain points within the current UI

## **Research Questions**

- Before we get started, we want to first ask about your role within BNY. Can you tell us what your position is and how you use the Customer Service Workspace?
- Do you find that you experience pain points while using CSW?
- Now can you share your screen and walk us through these pain points and how they interfere with your daily tasks?
- (If they don't mention) How has your experience been with using the template functionality?
- Are there any new features you'd like to see in the system?

## **Key Performance Indicators**

- Ability to use template functionality
- Ability to complete daily tasks

## **Methodology**

- Moderated Usability Study
- Location: Remote
- Date: November 2022
- 27 total interviews were conducted over the course of two months. The first round consisted of fifteen user recorded interviews, while the second round consisted of twelve interviews.
- Each user recorded interview lasted anywhere from 20-60 minutes

## **Participants**

- Users with varying roles within the workspace
- Users with different amounts of experience
- Users not familiar with the project at all
- Super-Users
- Everyday Users