

Testing Script – SaaS Client – v2

NOTE: Give honest feedback...and vocalize what you're thinking / feeling as you go.

Reason – Determine tester's role in making org changes and their familiarity with their org structure – all lead back to what user persona they are. Also, identify their pain points.

Setup Questions

1. What are the common org structures for your company?
2. How familiar are you with these org structure?
3. Do you deal with changing your org structure file(s) due to org changes (employee taking new position, etc)? If so, how often?
4. In your opinion, what are the most difficult parts of dealing with your org structure?

Reason – Initial thoughts and reaction with no instruction (pure SaaS model). See if we can provide instructions to help any common questions that occur. See if we missed any user experience expectations, data, visuals, etc or designed something in the wrong way.

Initial Exploration

Now we're going to allow you to perform a dry run (no instructions given) of the org management software. We're going to ask you to start the process of using the tool and play around with it for a few minutes. In particular, go through the process of logging in and visualizing your org structure.

1. Initial first impressions?
2. Were there any immediate questions you had while using it?
3. Did you find yourself having any trouble with anything?
4. Would this accommodate your hierarchies? If not, what could we change?

User Tasks

Now we're going to ask you to perform a series of user tasks, followed by questions at the end of the tasks.

Reason – See if the changes to the info-pad makes it easier for a user to find both the node-level info and overall org info. Test language changes as well.

Basic hierarchy tasks

1. Where is the main hierarchy?
2. How many positions need to be filled?
3. How many levels deep is the entire org structure?
4. If you wanted to see the total number of employees in the main hierarchy, how would you find this information?
5. If you wanted to find out some basic information about the CMO, like their Employee ID, how would you do this?

6. Would you want additional attributes in the employee visualization other than just Name / Title?
Does the order matter?

View/Data-related tasks

7. If you wanted to see how many direct reports a CFO had, how would you do this?
8. If you wanted to see the total number of employees under CTO has, how would you do this?
9. If you wanted to see a list of all the employees that work under the CMO, how would you do this?
10. Was the language used clear? Does your company use different terms than we used?

Reason – See if the right-clicking for node actions (like editing) is obvious. See if “editing” is easy to find in the modal.

Editing Tasks

11. The CMO just got married and needs to change her last name. How would you go about changing this?

Reason – Are hierarchy level additions need?

Hierarchy-level additions

12. Would you ever run into a scenario where you would need to add a new hire into the application but they don't have a supervisor yet, so you need to add them in as unparented? If so, how common would this be?

Hierarchy-level action

Reason – See if the CTA below is “Unparented” label works. See if the renaming of the specific actions is more obviously to what they actually do.

13. A new strategy manager, Stacy Hines, has been hired under the CFO. How would you add her into the hierarchy?

Reason – See if the renaming of the specific actions is more obviously to what they actually do.

14. Isaias Lopez (under Ryan Mack) has taken a new position with a new company. You need to delete him from the hierarchy but keep his position because it is in the process of being filled. How would you do this?

Reason – I'm not explicitly calling out the idea that moving a single employee means that their position still remain in the hierarchy, but as an open position. See if this is intuitive and makes sense. Also, see if the moving UI and userflow makes sense.

15. Zoey Brandt (under CFO) was just moved under Ryan Mack. How would you do this? Once you made the move, Zoey's positions remain in the hierarchy, but as an open position.

Reason – See if userflow to move an employee using the search within the Move Mode is obvious

16. You need to move Zoey Brandt under an employee with the name "Zack Johnson" but have no idea where he is in the hierarchy. How would you go about moving Zoey?

Search tasks

17. Click on the search bar. You're trying to find an Ellen that's a DM Associate. Go ahead and search for DM Associate.

18. Now, if you wanted to go back to the previous person you were looking at before the search, how would you do this?

Final Observations