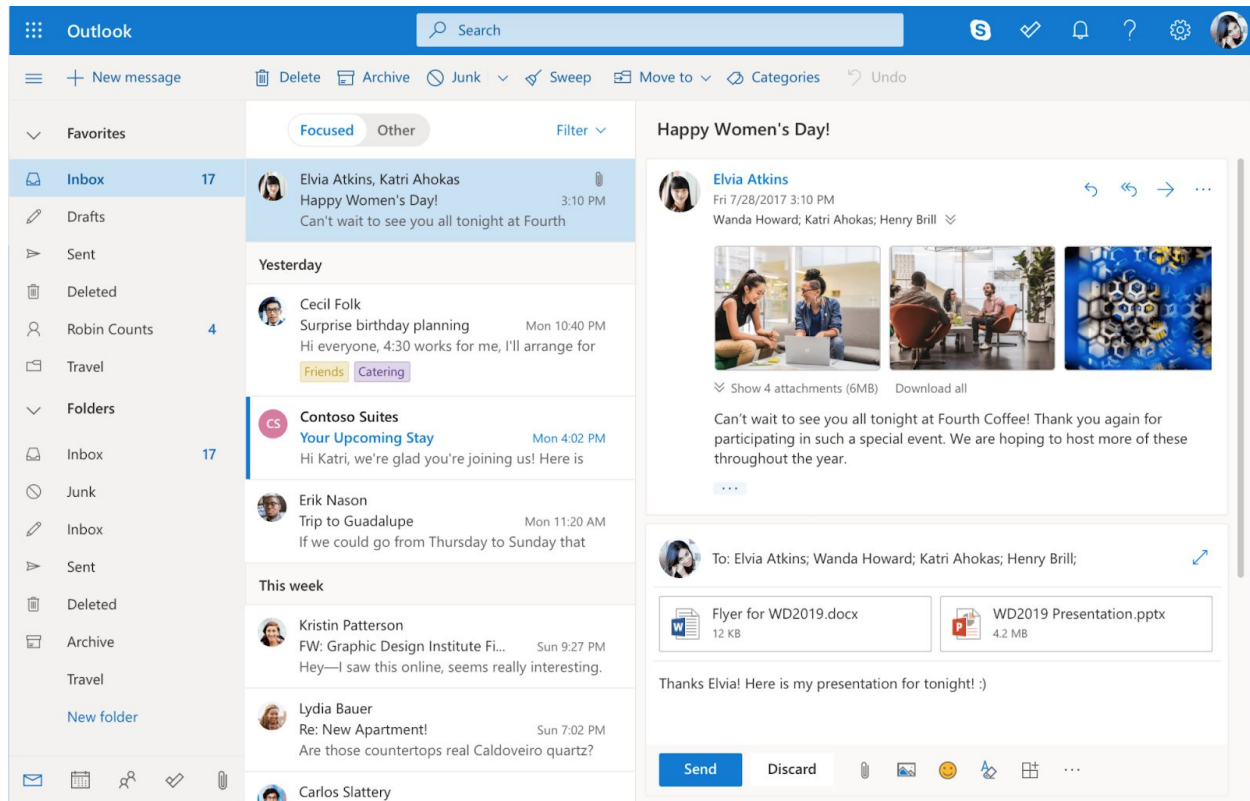# Outlook.com
Usability Study Protocol

KMDS Labs

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ISE 215 | Usability Testing | 05/09/2020

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Executive Summary

Originally known as Hotmail.com, Outlook.com is the web-accessible version of Microsoft's well known enterprise software, Outlook. Despite the large success of Microsoft's corporate email software, Microsoft's **personal** email service these days has less name recognition when compared to more popular web-based email services like Gmail and Yahoo. Clippy, Inc. was interested in learning more about why this gap in popularity existed.
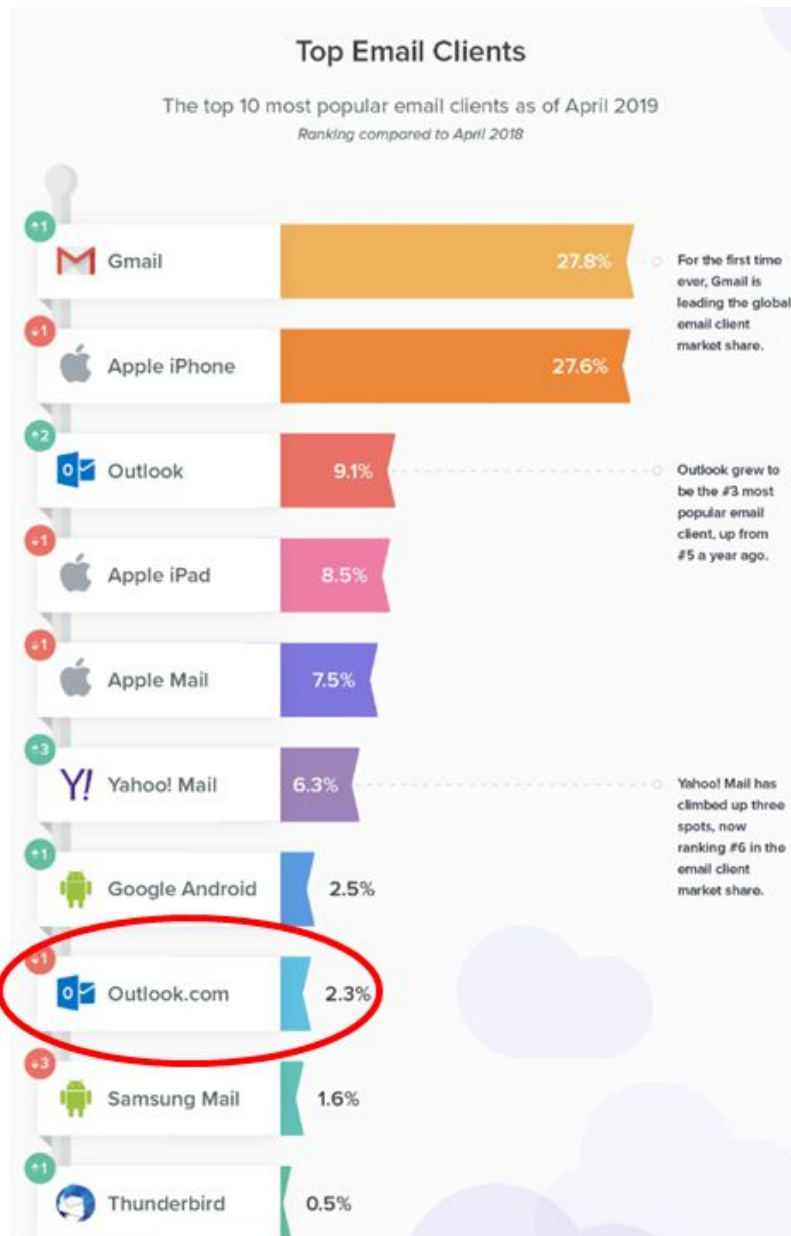
Source: *Litmus Email Analytic*

What We Did

To approach this question, our team began by performing a competitive analysis on Outlook.com to determine how it compared in the market. We learned that Outlook.com appeared to have all the same common features as its competitors like calendar integration, contact management, and email sorting. Next, in great detail, we performed a heuristic evaluation of Outlook.com's every function. We then used findings from our heuristic evaluation and competitive analysis to inform the larger usability study. The objective of our study was to evaluate Outlook.com's interface against a set of human factors principles and usability standards. Some of the questions we wanted to answer included:

- Is the interface intuitive? Can users find what they need?
- Do users find Outlook.com visually appealing or are the ads off-putting?
- Does Outlook.com act as expected, especially as compared to competitors?
- Is it easy to use? Can users complete common tasks without difficulty?
- Are people enticed to purchase an upgraded Outlook.com account?

Our study had two participant groups and two subgroups: average users and power users with subgroups defined what email service they primarily used. Average users were defined by how they commonly used email and power users were defined by what advanced email features they may have commonly used.

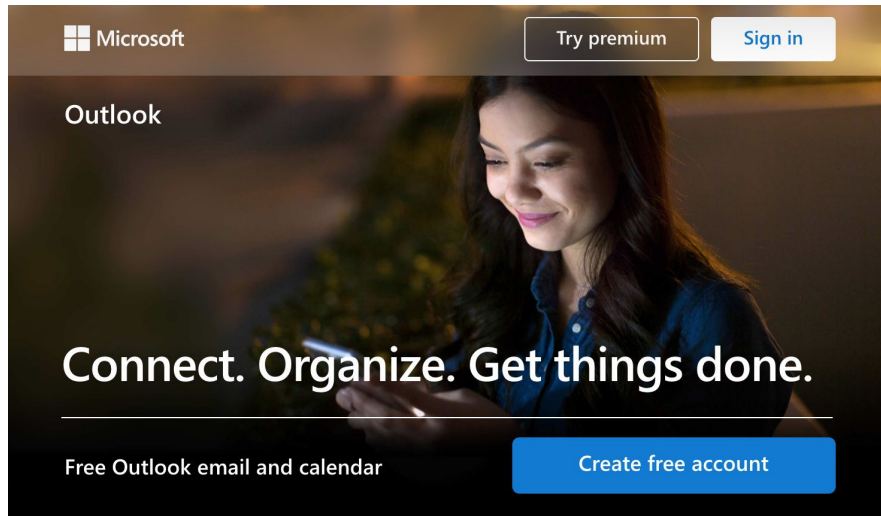| Total Participants: 6		
Condition / subgroup	**average**	**power**
Competitor user	4	1
Outlook.com primary user	0	1

The scripts we developed for each participant group were similar; they included common tasks we felt were representative of how individuals might actually use email outside of our study. From our average users we were hoping to gain a more common perspective of Outlook.com.

We wanted to know how average users would fare with basic email tasks and simple email functions. We also wanted their overall perspective of the service to see if it would really be something they would be interested in switching to. From our power users we were expecting people who use and rely on an email service in their day-to-day lives, possibly for work, and were familiar with advanced functionality. Advanced users will typically have their account set up in a specific way to increase productivity. This includes things like automatic email sorting and weekly calendar meetings. We wanted to know if Outlook.com had the chops to suit the higher needs and requirements of power users. To read exactly what these tasks involved, you can find our full scripts in **Appendix F**.

Along with these tasks, our script was designed with a holistic data collection approach in mind. It was not important for us to only understand *if* a participant was able to successfully complete a task, but as well it was important for us to understand how they completed the task, how their behavior changed during the task, and what their perception of the product was while they completed the task. To accomplish this, our data not only included performance metrics, but also included behavioral measures, subjective measures, and knowledge probes. Having multiple measures and metrics gave us great insight into why participants were struggling.

What We Found

The participants' first impressions of Outlook.com were mostly positive. They felt Outlook.com had a clean design and had all the same features as current email providers—even if they couldn't name all the features. However, the premium version of Outlook.com lacked visibility, and did not present a strong enough value proposition for most participants to consider purchasing.

When making a new account, it was clear the captcha was too difficult to complete, as all participants struggled to enter it correctly. Password requirements were also unclear. Despite these difficulties, participants thought the registration process was easy, but their behaviors suggest otherwise.
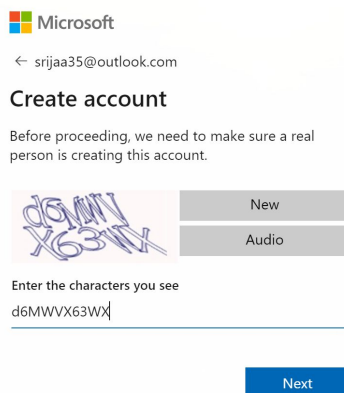
When participants made their account, we gave them some time to explore the interface and set up the account as they normally would. While setting up their account nearly all participants ran into a frustrating behavior that hijacks the user experience and requires users to input their phone number. Not wanting to give Microsoft their phone number, participants would attempt to back out of this page, but Microsoft will not let you access your account until you complete some kind of verification.
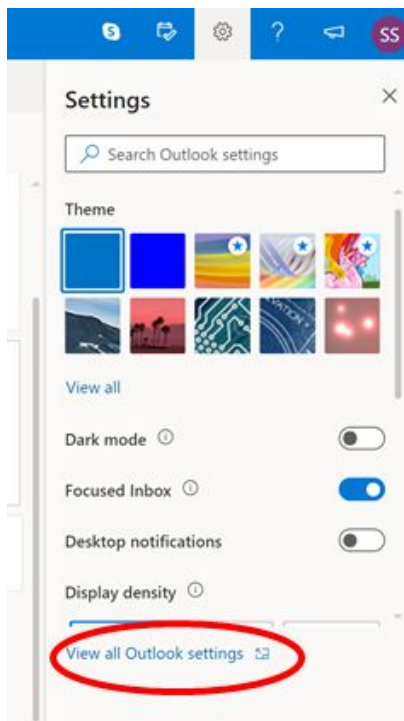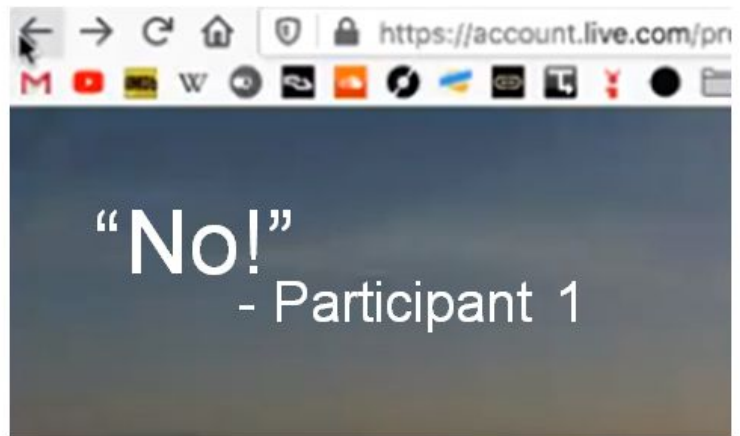
Other frustrations participants experienced included the fact that they had to click twice to get to useful account settings; this feature in particular confused and frustrated participants. Despite these difficulties, participants gave mostly positive remarks.

Once they had their account set up and were a little more familiar with the interface, we asked them to perform some basic email manipulation tasks. The largest deficiency in this portion of the interface was the poor visibility and feedback for users when they send, delete, or otherwise

manipulate an email. For example, if participants wanted to confirm that the email was sent, they had to look in the "Sent Items" folder.
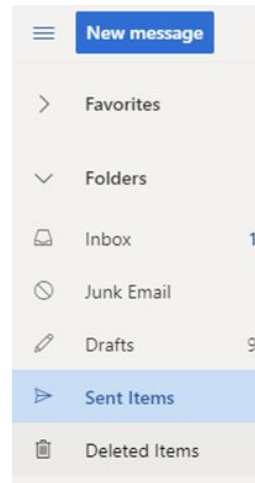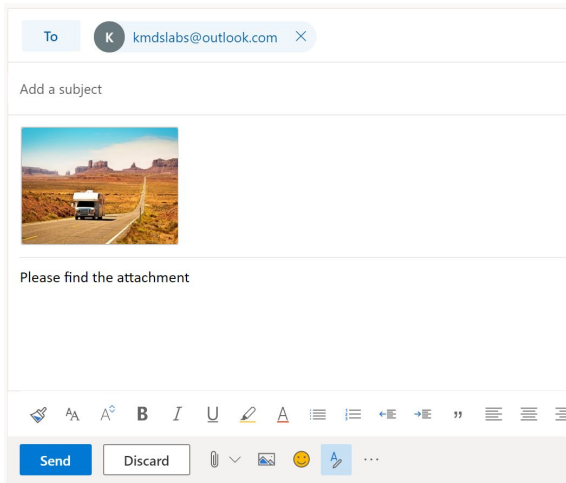
The same deficiencies also appeared when users attempted to set up rules or organize their emails into folders. Due to poor visibility and feedback users were confused and frustrated because it was not immediately clear if an email rule went into effect, or if an email moved to the folder they created.
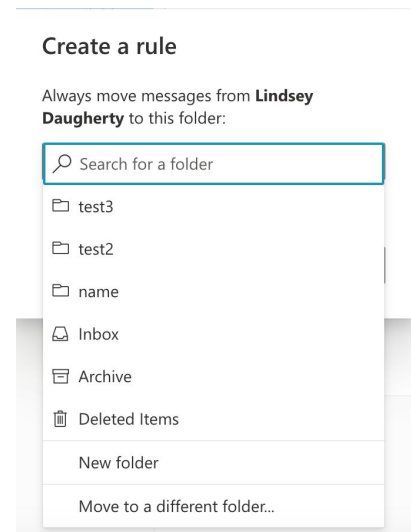
Another task we had participants complete was setting up an away message. Participants were able to find the appropriate setting, despite non-intuitively being called "Automatic replies". However, nearly all the participants ran into a strange "unable to load settings" bug. This was frustrating for our participants and would be even worse for real users.
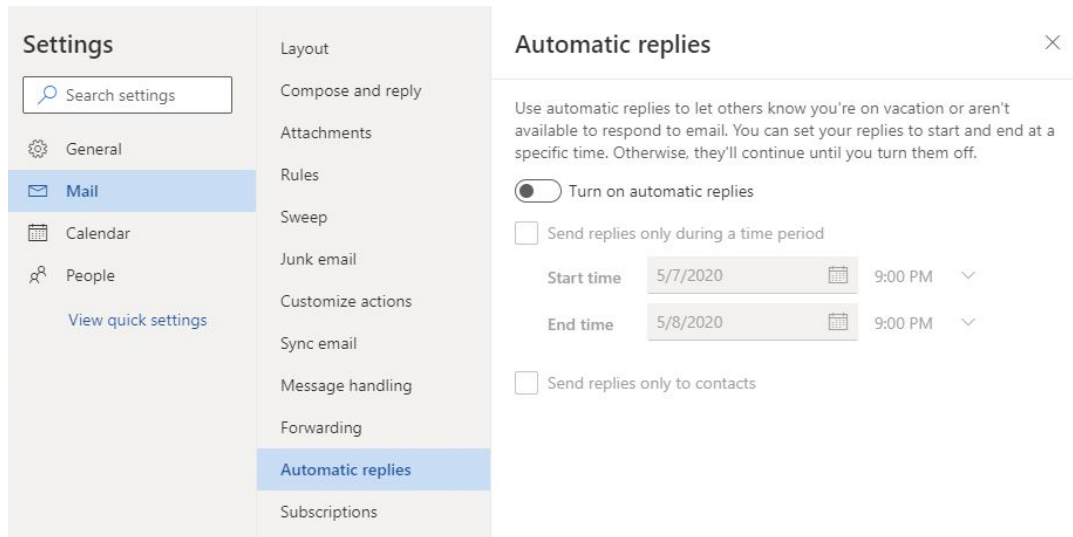
Only one power user (a competitor non-outlook.com power user at that!) was able to successfully connect an outside email account with their Outlook.com account. The main reason the other power user failed to complete this task is because the name of the setting needed to complete this task is confusingly called "Sync email". This represents a failure to match between the system and the real world and violates user expectations.
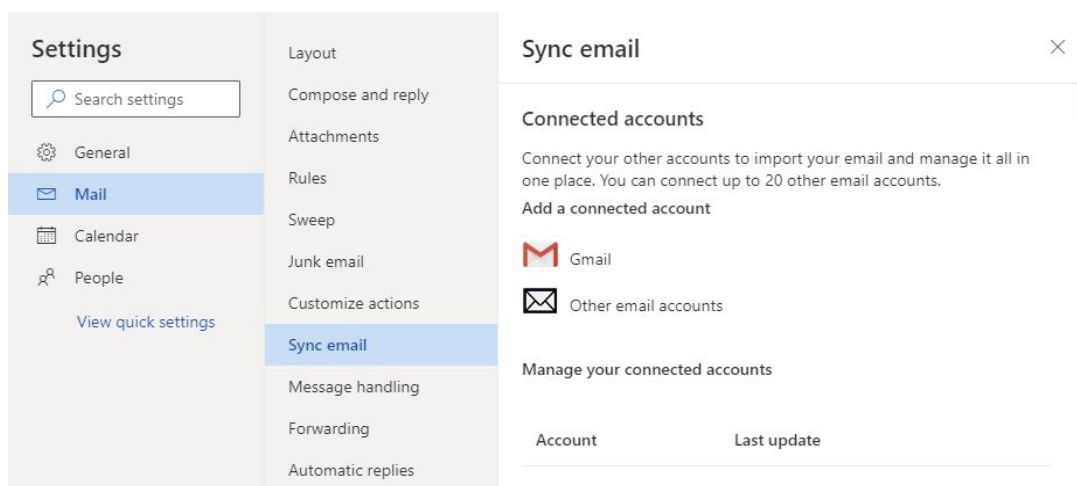
At the end of our study, we gave our participants a chance to reflect on their time with Outlook.com. Overall impressions were positive: participants thought the interface had a clean design and had all the features of their current email application. Participants who told us they would not be willing to switch to Outlook.com declared that it was because they have used their

current email account for too long. These positive interactions as a whole were despite clear signs of frustration and confusion during some of the tasks.

Outlook.com was described by one of our participants as "acceptable...if it was a beta [software]." This is similar to our overall impression of the service as well: Outlook.com is not a bad service to use, and with a few improvements it could become a great service.

What We Recommend

Too many participants struggled to correctly interpret the captcha puzzle when creating an account, which is why we recommend adopting newer forms of captcha. A better form of captcha would be to have users solve a picture matching puzzle instead.
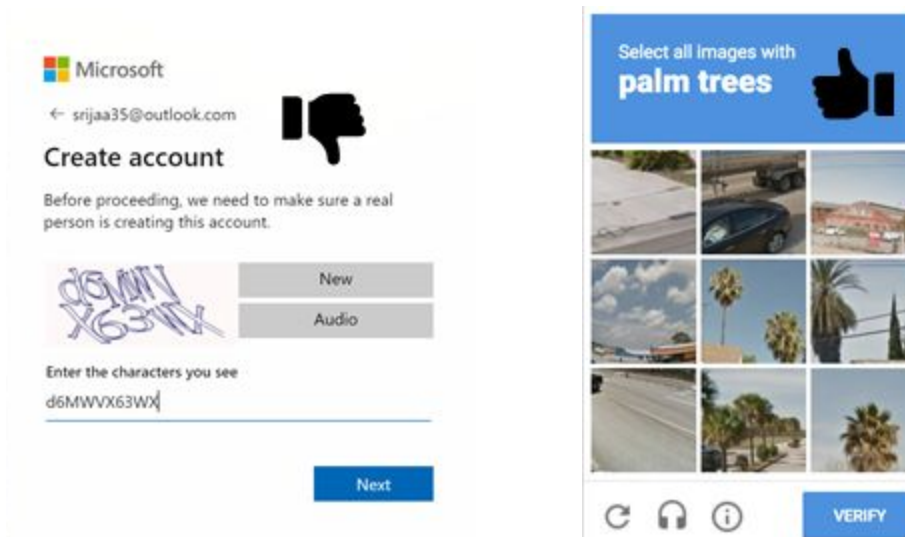
Advanced settings were another common source of complaint. To access more commonly adjusted settings, users must click the cog wheel, and then click "View all Outlook settings". This is needlessly two steps. We recommend using the cog icon to access advanced settings, and adding a "quick start" button of some form to access the condensed settings pane. Additionally, there are a lot of settings listed under advanced settings. It would be useful if these settings were ordered by what users found important.
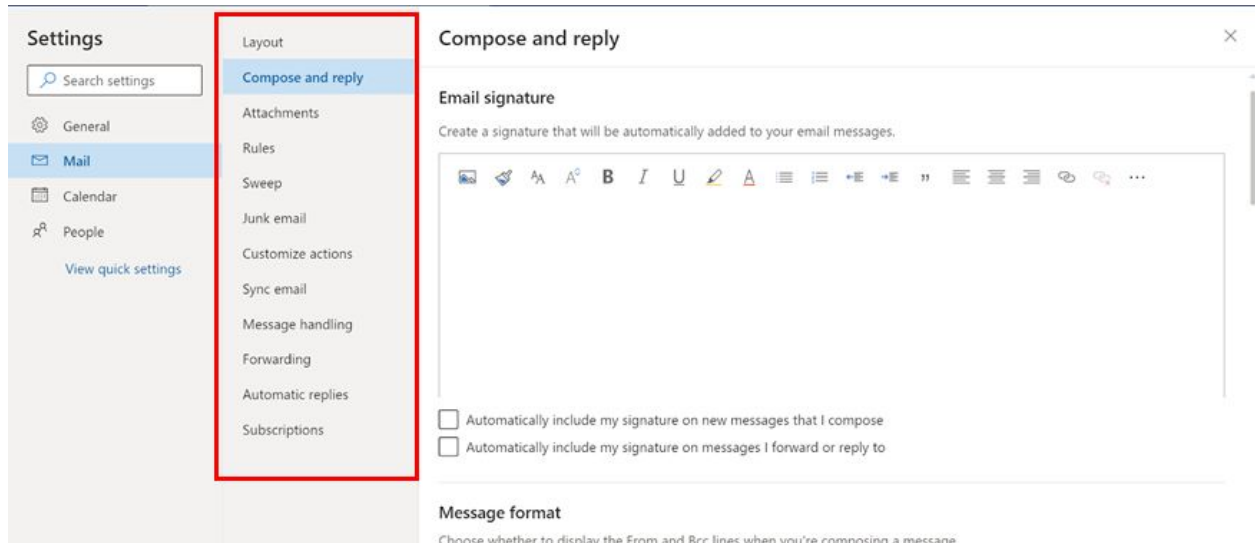
Another deficiency Outlook.com's interface has is its lack of feedback and visibility when a user sends an email. If a user wants to verify that their email was sent, they must check the "Sent items" folder. We recommend that Oulook.com adopts what competitors have done to mitigate this issue by briefly displaying a message confirming that the email was sent.
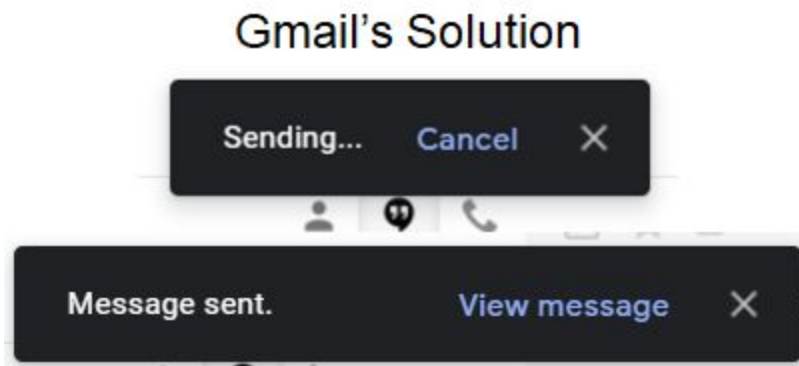
The "To Do" list icon is hidden within the three dots menu. When hidden away, it is easy for users to overlook this feature. We recommend making this button more noticeable, or redesigning this part of the interface to increase visibility.
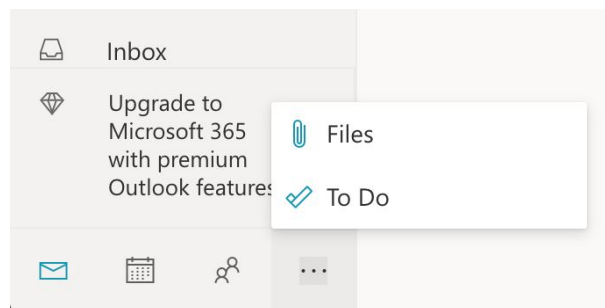
More advanced users who would like to connect outside email accounts to their Outlook.com account will struggle to find the appropriate setting to change. This is because "Sync email" is not intuitive verbage for this action. We recommend changing the name of this setting to something less confusing, like "Connect accounts".
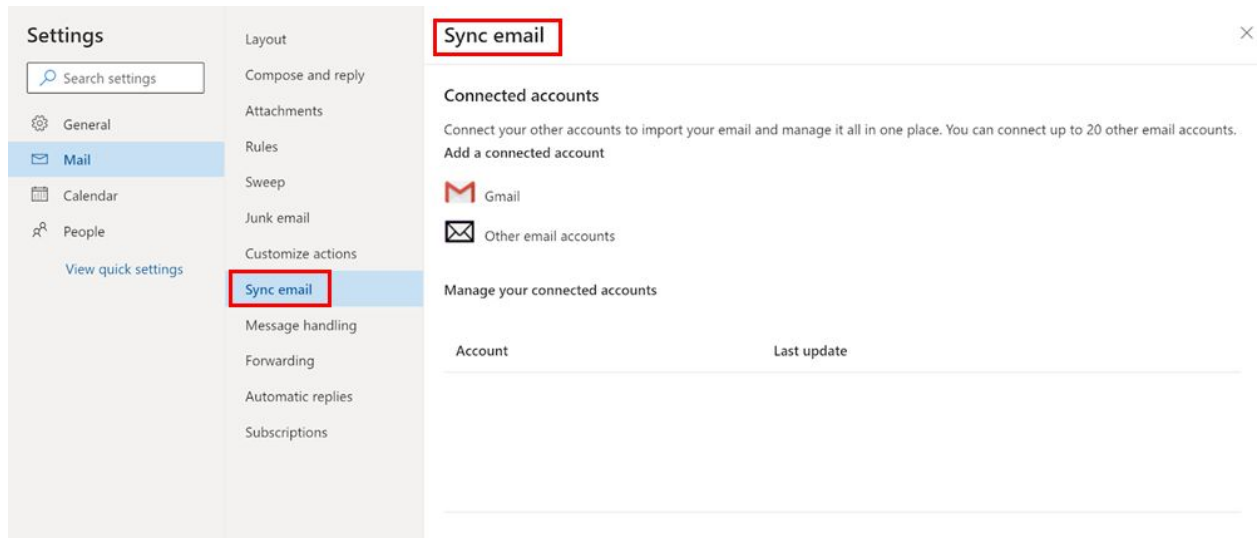
Ads could be better integrated into Outlook.com's interface. Specifically, as the right banner ad exists now, it violates the Gestalt principles of closure and proximity. We recommend moving this ad further away from the content and contain it completely.
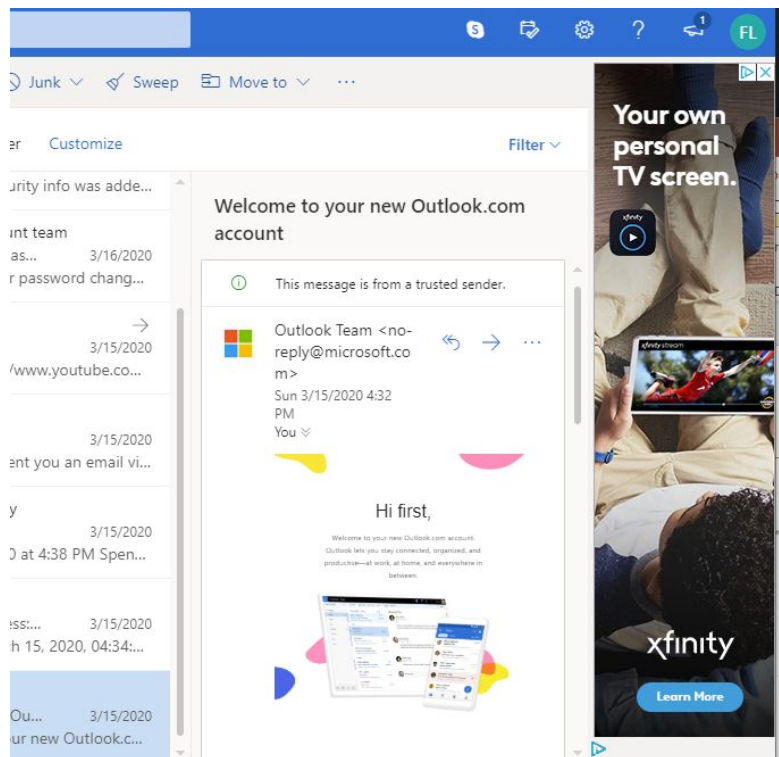
Throughout our study sessions, there was never a "show stopper" moment. Participants left our study with generally positive thoughts about Outlook.com, and some told us they would consider switching. Microsoft's web-accessible email client is not a bad service per se; we found the service satisfied the needs of both average and power users. But there is nothing that puts it far above the other web-based competition. Cleaning up the interface and making the adjustments we recommend to the user experience may be what is necessary to push this service into larger markets. Microsoft should reclaim the glory days of Hotmail.com, and we think our recommendations can help.

Introduction

Project Introduction

We were commissioned by Clippy, Inc. to perform a usability study on the Outlook.com email service. While Microsoft is one of the most recognizable brands in the world, the overall user base of Outlook.com is staggeringly low with only 1% of the market share. Clippy, Inc. planned to redesign Outlook.com for an upcoming relaunch of the product and needed to know which features were lacking and how to improve the overall user experience, as well as aiming for premium conversions. We ran a usability test to determine key issues with Outlook.com and provided suggestions for improvements.

This usability study was structured in a way that walks through the following:

- What the objectives of the study were;
- Who was involved (the participants, how they were recruited, selected, and grouped);
- Where they went (information about our lab facility);
- What they did while they were there (the procedures, including information about the session and scripts);
- What we wanted to learn and the reasons why (metrics and measures);
- What we actually learned after running the study;
- How Outlook.com can be improved based on both our study and usability principles.

Product Description

Outlook.com is Microsoft's free browser-based email service. Originally launched in 1995 as Hotmail.com, Microsoft purchased the domain in 1997 and rebranded everything in 2013. As of February 2020, Outlook.com holds a 1% market share based on Litmus Labs' email analytics.

Outlook.com allows users to send and receive rich text emails and organize emails by creating rules, sorting into folders, pinning, flagging, and adding labels. Outlook.com's interface provides multiple column views for easy browsing of emails.
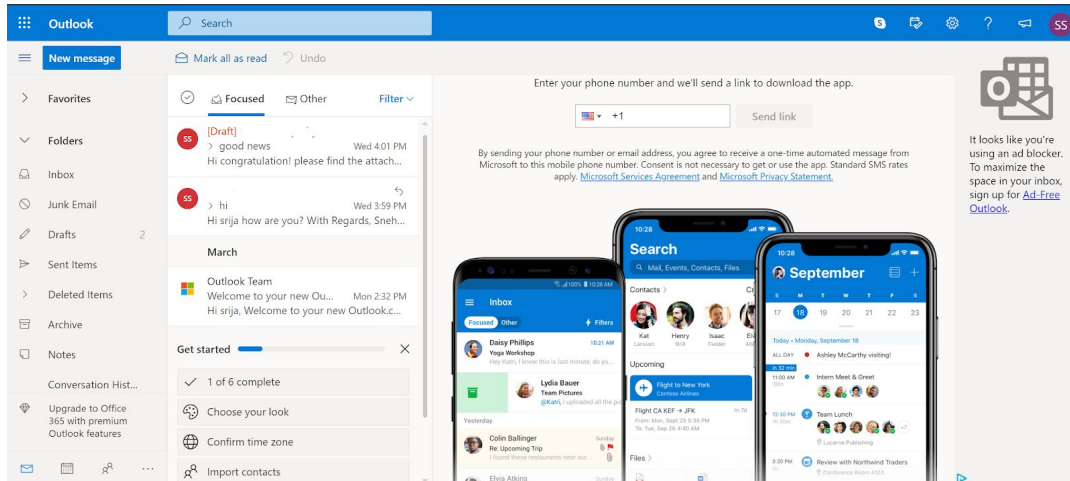
Outlook.com Email Default View

Outlook.com also has calendar features so users can schedule and manage meetings and events. The calendar is fully integrated with emails and includes a number of personalization options, like the ability to change colors, add sound to reminders, or add holidays or sports games with only a few clicks. Users can also organize a meeting, view group schedules and send a scheduled meeting to fellow participants through email, as well as send the user's schedule availability to other users.
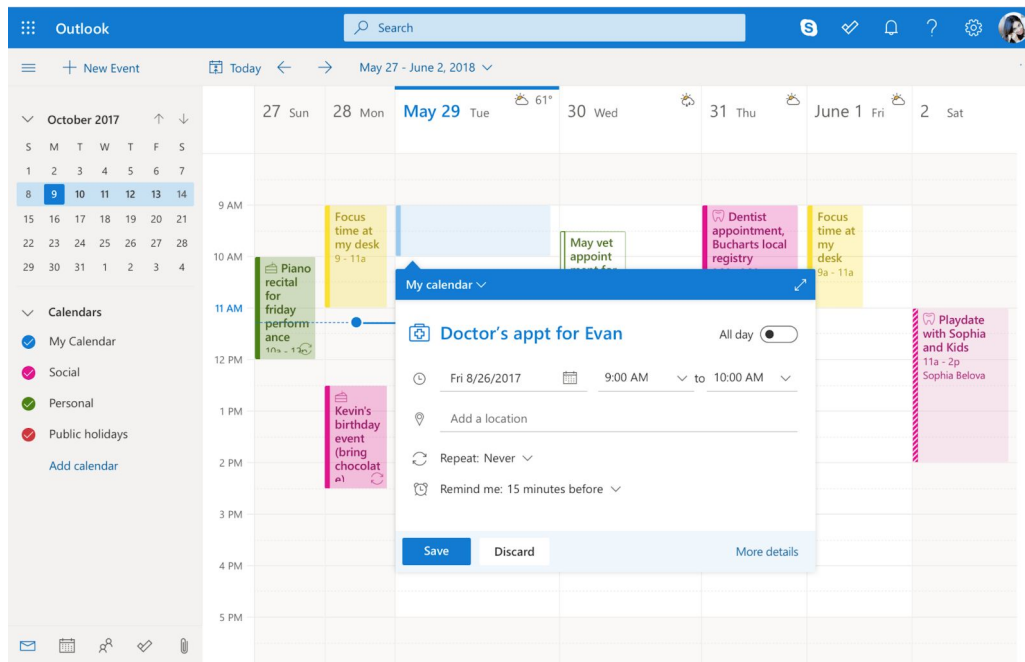
Outlook.com Calendar

Outlook.com has a contact database where users can not only save email addresses but also other information like phone numbers and addresses. Users can add contacts from received emails with just a few clicks.
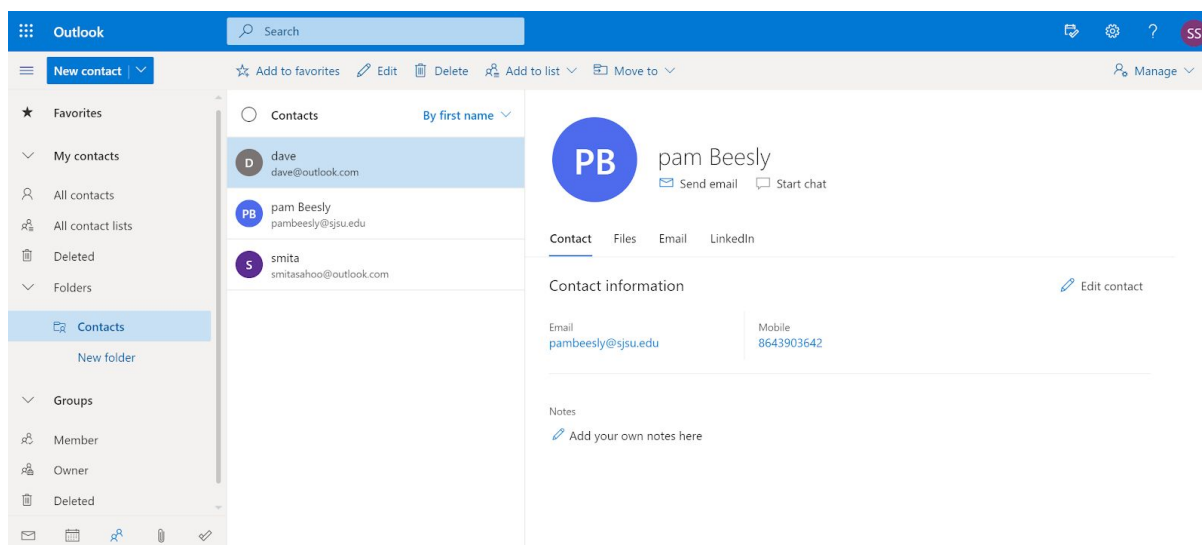
Outlook.com Contacts

Aside from the aforementioned functions, Outlook.com sells itself by touting superior protection, like data encryption both in the user's inbox and for sent emails, access to Microsoft's Office suite, collaboration features like chatting from Skype directly from the user's inbox, and improved accessibility with voice navigation features and support for assistive devices.

Competitors

Outlook.com's primary competitors are other free browser-based email applications, Gmail and Yahoo! Mail. Developed by Google, Gmail is a free email service that launched in 2004 and is the 2nd most popular overall email client with 28% of the market share, as well as being the most popular browser email service. Yahoo! Mail, on the other hand, launched in 1997 as part of Yahoo!'s suite of apps and is ranked as the 5th most popular email service with 5% of the market share. The following table is a brief competitor analysis that focuses on some of the major selling points of these services.

	Outlook.com	Gmail	yahoo!mail
Interface	Minimalist, compose button is located in a different location, contacts and calendar don't feel seamlessly integrated.	Common email labels are displayed on the left but other labels (Spam, Trash) are hidden under "More." It is not clear how contacts can be accessed.	Overall, a clutter-free design with clearly-labeled folders. Tooltips appear on hover.
Free storage	15GB	15GB	1TB
Organization options	Categories (functionally more similar to labels). Archiving. Folders. Rules.	No folders, but categories. Color-coded labels. Archiving. Filters.	Folders. Labels. Filters.
Ads	One large vertical banner on large screens, one horizontal ad on smaller screens.	2 unobtrusive, small text ads above email.	Ads that look like email, one large vertical ad.

Product Objectives

Microsoft is a powerhouse in the business world with Microsoft's Office suite as a staple of office environments, which includes programs like Powerpoint, Word, and Excel. Outlook, their desktop email application, and the larger Microsoft Office suite primarily excels by licensing its software to big business enterprises. Microsoft's software bundle works very well together, which is one of their major selling points. With a business environment in mind, Microsoft makes it very simple to set up meetings, share slides, and discuss spreadsheets with your colleagues.

Somewhat confusingly, Microsoft made the decision to name their web-based email client Outlook.com despite being an entirely separate software compared to the well-known desktop application *Outlook*. Outlook.com's web-based service provides similar functionality to most other email providers and gives users the means to communicate between friends and colleagues.

Some of the major uses of Outlook.com include:

- Drafting and saving emails
- Organizing emails into categories to easily find them again
- Filtering junk or spam email
- Calendar integration including settings up meetings
- Writing notes
- Assigning and reviewing tasks
- Contacts management
- Quick access to the other Microsoft Apps in the Office suite

Microsoft's primary product objective for Outlook.com is to convince users to upgrade to a premium account and purchase a Office365 software license. Like other companies, Microsoft wants users to be invested in the Microsoft ecosystem, and they reward you for this investment by making it very seamless to transition between their pieces of software, like Excel, Powerpoint, and Outlook—among other premium features like online storage, premium support, and custom domains. An example of this ecosystem is Powerpoint's built in share option, which allows users to attach slide decks to emails using Outlook in as little as three clicks.

Study Motivations and Objectives

While there are many web-based email services available, the overall market share of Outlook.com is surprisingly low, especially given that Hotmail.com had the largest user share as late as 2012—years after one of its main competitors (Gmail) launched. Our primary objective was to uncover usability issues with Outlook.com that might help explain its decreased popularity.

To determine usability issues, we performed a heuristic evaluation on Outlook.com, a comparative analysis using primary competitors Gmail and Yahoo! Mail, and ran a usability test to collect quantitative and qualitative data. The usability test report contains the results of the usability test, including user perceptions of Outlook.com and difficulties they had using it, as well as suggestions for user experience improvements. The key stakeholders of Outlook.com should be able to refer to this document to guide design decisions for a superior product release in the future, which could encourage users to pick Outlook.com over other email options.

The primary usability dimensions covered in our study include:
- Is the interface intuitive? Can users find what they need?
- Do users find Outlook.com visually appealing or are the ads off-putting?
- Does Outlook.com act as expected, especially as compared to competitors?
- Is it easy to use? Can users complete common tasks without difficulty?
- Are people enticed to purchase an upgraded Outlook.com account?

Test Approach and Philosophy

Our study protocol was built following a few human factors and usability standards and practices that we believe created a superior usability study. The value of our approach to usability studies was supported by three factors:

1. Our belief in obtaining natural user reactions and approaching the ideal of a hidden camera observation.
2. Naturalistic scenario building represented in our tasks, which were designed from hours of heuristic evaluations and hands-on experience with the product.
3. Using a mix of usability measures like knowledge and perception probes, performance, behavioral metrics, and subjective metrics, to better define user "success."

It is not our interest to only understand if a user can set out and finish the tasks we lay out before them: of equal concern is how the user completed the task. The greater importance of this study is to determine insights from close observations of participants paired with a mix of usability metrics to ultimately help make recommendations for improvements. These insights are best generated when including multiple dimensions of success. For example, our study protocol

used knowledge probes to determine if people actually knew and understood the interface they were using. We also used perception probes, which gave participants a chance to speak their mind freely about the product—sometimes separately from the task they were performing. The task itself may be intuitive, but the interface may be off-putting, or perhaps may feel unappealing. Sentiments like these would not be captured via traditional means and by capturing these various dimensions we gained a better overall understanding of any usability concerns.

In addition to ensuring that our usability measures were diverse, we strived to create an environment where users were performing natural tasks and didn't feel like they were being watched as part of a study. To promote this ideal, we firstly set up our test environment to be similar to real world conditions where a user would be experiencing the product. Secondly, we gave them activities to do that are goal-based in addition to task-based. Lastly, we left the user alone during some tasks and allowed for "free play" during the session so they can experience the product by themselves without direction.

By enacting this philosophy in our study protocol we produced a comprehensive set of results that covered all aspects of user behavior, and in turn, allowed us to provide a set of recommendations that will result in a greatly improved user experience.

Methods

Study Design Overview

We designed a study plan for Outlook.com that evaluated the most common user tasks, captured user perceptions, and explored usability issues. The usability issues we were concerned with include: feedforward, consistency and standards, visibility, discoverability, affordances, and match between system and real world. As a web-based email service provider, Outlook.com's major use case is for users to send and receive email. However, it also has a number of other tasks users can perform, like creating and managing appointments, making to do lists, and managing contacts. This study was designed to encompass the most common use cases, as well as the less common but unique features that Microsoft advertises.

To fully capture user experience issues found within Outlook.com, 20 participants were recruited: twelve average users, and eight power (expert) email users. In addition to these two user subgroups, there were two conditions: those who use Outlook.com as their primary email provider and those who do not (e.g. competitor users); four of the average users and four of the power users will be Outlook.com primary users. Participants were recruited via flyers and online advertisements and screened by asking questions about their education, occupation, computer history, and email experience.

The two user groups had different scripts and activities to complete, and both groups answered questions related to Outlook.com. The activities included both goal-based tasks and other specific tasks, as well as a gamut of probes (knowledge and perception), Likert scale determinations, and open-ended questions. After the main usability study was finished, users discussed their final thoughts before leaving our testing facility.

Average users are those primarily interested in sending and receiving emails. These users might explore some additional functionality like email signatures or away messages, but do not typically delve any deeper into the additional features of their email application. The majority of people who use email fall into this category.

Power users are those that frequently use email for tasks outside of the typical use case of sending and receiving email. Their goal is usually to manage time and people via their email

service as opposed to communication. Many power users may be project managers, executive assistants, or other occupations where managing time and tasks is of the utmost importance.

Three metrics were captured via these activities: performance, such as the time to complete certain tasks; behavioral, via mouse hovers, facial expressions/body postures, and utterances; and subjective, as the moderator asks the participant how much they like certain aspects of the website, how easy they found certain aspects of the website, etc.

The entire session was recorded using three cameras: one ceiling-mounted to record the keyboard, mouse, and test materials; one to record the participant's face and torso; and one to record the computer screen. A data logger was in the observation room to take notes, along with an AV controller who monitored the audio levels and communicated as needed to the testing room. A moderator was in the testing room to walk the participants through tasks and ask questions.

The allocated time for the session for each participant was 60 minutes. 15 minutes post-study was reserved for KMDS Labs staff to write additional notes and observations, and an additional 15 minutes was reserved for room reset. Four KMDS Labs personnel were on hand to run the study, in the roles of receptionist, AV controller, data logger, and moderator.

Participants

Our study protocol included 20 participants who met the inclusion criteria defined in this document. Experts in the field recommended having a bare minimum of 12 participants, with at least 4 users per condition or subgroup. Given that we had 2 subgroups and 2 conditions, the minimum number of users we felt comfortable with was 16. We added additional average competitor users since competitor user feedback was incredibly important in discovering how to potentially cater and entice new users towards the Outlook.com service, and 8 participants allowed us to capture close to all of the usability issues that naive users experience.

Recruitment

The 20 participants were recruited from around the San Francisco Bay Area using flyers posted around downtown San Jose, as well as online advertisements posted on Craigslist and

Facebook groups. The advertisements contained the date of the study, facility location, compensation amount, time commitment, a brief about what the study is, who is qualified to participate, and a contact name, phone number, and email address [see **Appendix A** for sample recruitment ads].

Subgroups and Condition Log

We split the participants into two subgroups: an average group and a power user group. Average users were defined as those who primarily use basic email features, and power users were users comfortable with and use advanced features such as rules-based filtering and calendar invites on a regular basis. In addition to these subgroups, we employed a condition to determine if the participant uses Outlook.com as their primary email application or not; four average users and four power users had Outlook.com as their primary email provider [see **Appendix B** for the Condition Log].

Total Participants: 20		
Condition / subgroup	**average**	**power**
Competitor user	8	4
Outlook.com primary user	4	4

The subgroups had different scripts and tasks to complete, as the power users typically have different goals in mind when using email applications. While average users might send emails, they don't usually attempt to organize their email to the same level that power users do with rules, categories, labels, etc. Thus, the decision to separate users into the two subgroups:

Average Users (8 participants):
- A variety of experience using an email application—typically moderate
- Can send/receive emails but isn't familiar with much beyond that
- Primary email application may be Outlook.com (4) or not (8)

Power Users (8 participants):
- Extensive experience using a web-based email application

- Use of advanced features in web-based email applications (rules, labels, calendar invites, etc)
- Primary email application may be Outlook.com (4) or not (4)

Screening and Inclusion/Exclusion Criteria

Everyone who responded to the study advertisements was given screener questions over the phone to ensure they were qualified to be participants. All 20 participants needed to be between 18 and 80 years old, have some experience using an email application, have full movement and dexterity in at least one hand, have no vision or cognitive issues, and speak fluent english. Additional questions were asked to gauge web-based email application experience along with occupation, education level and computer usage history [see **Appendix C** for Screening Form].

Potentials who met all of the inclusion criteria were marked as eligible participants. Potentials were selected such that the final eligible group will demonstrate a wide variety of ages, ethnic backgrounds, genders, and occupations. Those eligible potentials were contacted via phone and/or email to schedule a time to be included in the study. Potentials who did not respond or cannot make the specified time slot were marked as ineligible; eligible potentials were contacted until all twenty slots were filled.

Those moving forward as participants were sent an email to remind them of their upcoming session, and various helpful information was included: the session date and time, facility location, general directions to the facility, and the day's schedule with the participant's time slot highlighted to emphasize the importance of arriving on time.

Inclusion Criteria	Exclusion Criteria
- Uses or has used an email application - Full dexterity in at least one hand - No major vision issues - Speaks and writes fluent english - Over 18 years old - No cognitive impairments	- Does not or has not used an email application - No mobility/dexterity in both hands - Vision issues not solved by corrective lenses - Does not speak or write fluent english - Under 18 years old - Does not own a cell phone - Has cognitive impairments

Lab Facility

Facility Overview

The KMDS Labs usability testing facility was located in San Jose, CA. The facility contained four main rooms: a waiting room/reception area, a testing room, an observation room, and an AV room. Participants arrived and checked-in with the receptionist, then waited until they were called in to the testing room by the moderator. The sound-proof testing room contained three cameras to capture the participant's face/body, the computer/device screen (or product closeup), and the keyboard/desk (or participant hands closeup); the cameras could be zoomed and rotated as needed. A ceiling microphone helped capture additional audio. Small speakers were also located in the test room in the event the AV controller needed to contact the testing room. The AV room had large monitors showing the live feed of the testing room cameras, a one-way mirror to view into the testing room, locked storage cabinets to store equipment, laptops for the data loggers, audio controls (e.g. mixer) and computer setup for AV controller staff. Our observation room had another observational mirror, and a monitor showing the participant camera. If any clients came to observe additional seating may be moved into the room.
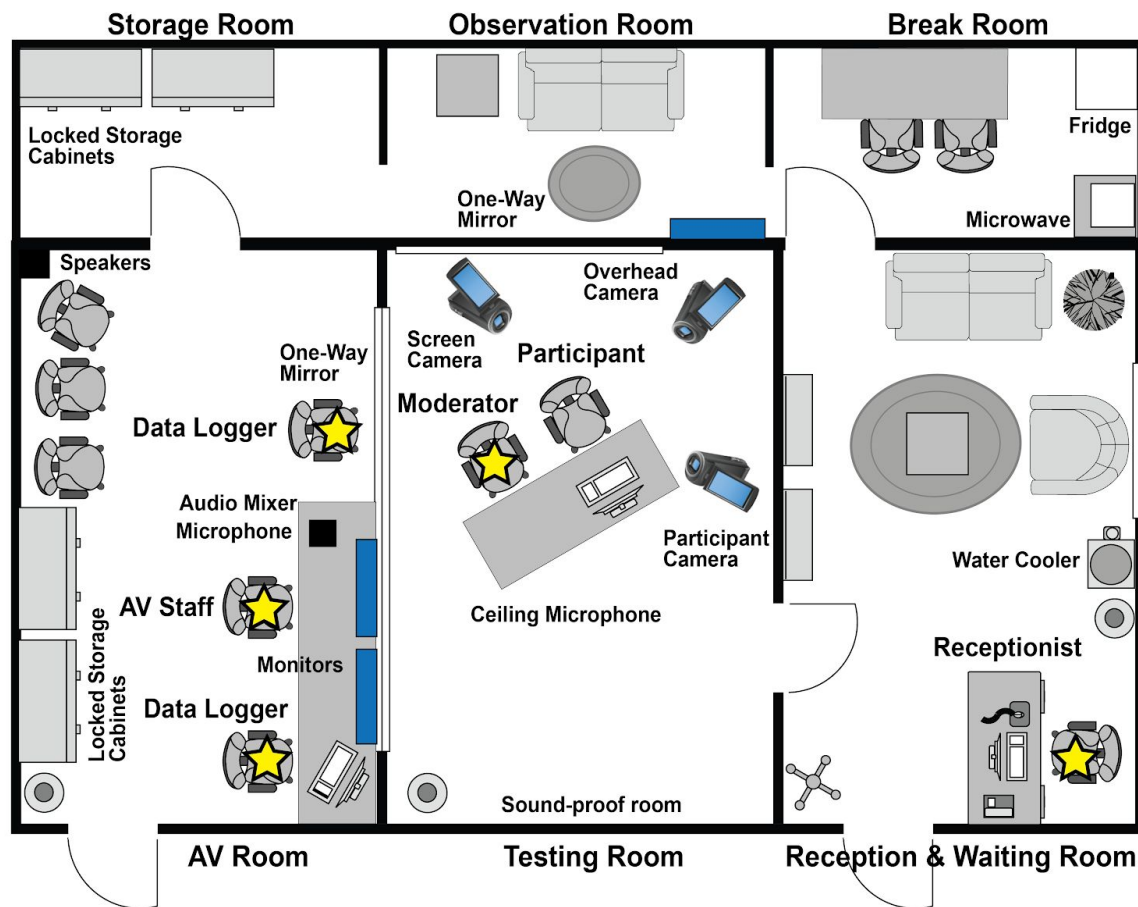
Lab Facility Layout

Lab Setup

For this study the lab was set up in a home office configuration, including a standard computer desk, two office chairs, and a complete computer desktop system with keyboard, mouse, and monitor. The computer was a 2019 Apple iMac with the latest version of the MacOS installed (10.15), along with the Parallels application and the latest version of Windows 10. Additionally, a variety of web browsers (Chrome, Firefox, Safari, Edge) were installed on both the MacOS and Windows 10 operating systems. A document tray organizer contained the task sheets and all props (e.g. business cards). Lab personnel set up the facility and equipment per the checklist located in **Appendix G**: this primarily involved making sure equipment was turned on and running, that the computer had the proper applications (e.g. browsers) installed and that there was no caching, and that important participant actions were taken (e.g. signing the consent form and receiving compensation).

Test Personnel

Four KMDS Labs personnel were on hand to run the usability study. Their roles were as follows:

Role	Role Description
AV Controller	The AV controller ensured all equipment is set up and operating properly prior to each session. The AV controller monitored all equipment during the session, including zooming cameras and adjusting audio as needed. The AV controller also was responsible for populating the new user email accounts by sending emails.
Data Logger	The data logger recorded the participant's reactions and facial expressions, navigation paths, time on task, and verbal responses as required per the script for each task or question the participant engaged in.
Moderator	The moderator escorted the participant to the testing room, let them know what the session would entail overall, conducted the session with the participant by asking questions and assigning tasks, and answered any questions the participant may have.
Receptionist	The receptionist greeted the participant, handled the sign-in process, and ensured they understood the consent form. The receptionist answered any general questions about the process but not about the study itself. Once the session was over, the receptionist distributed compensation to the participants.

Procedures

Session Overview

The sessions were slated to last for 60 minutes for each participant. We enumerated the total session time with each activity planned to the minute to ensure each session ran the proper length. A more detailed description of each activity is detailed below and in the sections that follow.

The session schedule for **average** users is thus:
- Participant arrives and is greeted by the receptionist (2 minutes)

- Participant is verified and signs consent form (2 minutes)
- Session introduction (2 minutes)
- Pre-interview (5 minutes)
- Activities (34 minutes)
- Free play (5 minutes)
- Post-study interview (8 minutes)
- Compensation (2 minutes)

The session schedule for **power** users is thus:
- Participant arrives and is greeted by the receptionist (2 minutes)
- Participant is verified and signs consent form (2 minutes)
- Session introduction (2 minutes)
- Pre-interview (6 minutes)
- Activities (31 minutes)
- Free play (5 minutes)
- Post-study interview (10 minutes)
- Compensation (2 minutes)

Average Users

Activities Description	Time Allotted
The participant is greeted by the receptionist upon arrival. The receptionist asks for a form of identification to pull up appropriate files while the participant waits in the reception area.	2 minutes
Receptionist prints consent form, returns ID, and explains the consent form. The consent form includes an overview of the study, the participant's compensation and time commitment, an acknowledgement that video and audio of the participant will be recorded, and that they have the right to leave the study at any time albeit forfeiting their compensation [see **Appendix D** for Consent Form]. The participant then signs the consent form and the receptionist collects and files it.	2 minutes
The moderator escorts the participant to the testing room and gives the introduction spiel, which explains the goal of the study and stresses that participants will not be judged on their competency with Outlook.com, but instead giving the researchers valuable information	2 minutes

as the participants encounter issues they may struggle with. Participants also have the ability to ask questions during this time. See **Appendix E** for the full Session Introduction.	
The moderator asks the participant pre-interview questions per the script in **Appendix F**. These questions are related to the participant's use of email, which browser they use, and which email service they primarily use.	5 minutes
The tasks commence: the moderator guides the participant through the activities using the script in **Appendix F**.	34 minutes
Moderator informs the participant that they can have free play with Outlook.com and leaves the room.	5 minutes
Moderator returns and conducts the post-study interview.	8 minutes
The moderator escorts the participant to the reception area and the receptionist handles compensation.	2 minutes
Total	60 minutes

Power Users

Activities Description	Time Allotted
The participant is greeted by the receptionist upon arrival. The receptionist asks for a form of identification to pull up appropriate files while the participant waits in the reception area.	2 minutes
Receptionist prints consent form, returns ID, and explains the consent form. The consent form includes an overview of the study, the participant's compensation and time commitment, an acknowledgement that video and audio of the participant will be recorded, and that they have the right to leave the study at any time albeit forfeiting their compensation [see **Appendix D** for Consent Form]. The participant then signs the consent form and the receptionist collects and files it.	2 minutes
The moderator escorts the participant to the testing room and gives the introduction spiel, which explains the goal of the study and stresses that participants will not be judged on their competency with Outlook.com, but instead giving the researchers valuable information as the participants encounter issues they may struggle with.	2 minutes

Participants also have the ability to ask questions during this time. See **Appendix E** for the full Session Introduction.	
The moderator asks the participant pre-interview questions per the script in **Appendix F**. These focus around the participant's experience with email services, their occupation, the types of things they do in their email service to manage time and people, their preferred email service, etc.	6 minutes
The tasks commence: the moderator guides the participant through the activities using the script in **Appendix F**.	31 minutes
Moderator informs the participant that they can have free play with Outlook.com and leaves the room.	5 minutes
Moderator returns and conducts the post-study interview.	10 minutes
The moderator escorts the participant to the reception area and the receptionist handles compensation.	2 minutes
Total	60 minutes

Session Time and Compensation

Each participant was given $200 for a 60-minute session. With 20 participants, the total cost for participants was $4000.

Participant Welcome

The participants were greeted by the receptionist when they arrived at the facility. They were asked to present some form of identification so the receptionist could pull up appropriate files; meanwhile they were asked to wait in the reception area. The receptionist then returned their ID and gave them a consent form. The receptionist explained the key points of the consent form, like that their participation is voluntary and they can leave at any time, the length of the session and compensation, and that they will be recorded during the session [see **Appendix D** for Consent Form]. The receptionist encouraged the participant to ask any questions they might

have and to sign the form. The receptionist then took the completed form from the participants and filed it for future reference.

Meanwhile, the moderator ran through the setup checklist to ensure that the testing room was set up properly and had all of the required items. Once the AV Controller ensured the equipment was functioning and recording, the moderator escorted the participant to the testing room and the session began.

Session Introduction

The moderator showed the participant where to sit and began by explaining that the participant was a member of our team for the next hour in the attempt to discover any usability issues in Outlook.com. They also mentioned that the participant would be completing activities using Outlook.com and answering questions afterward. The session introduction was the same for all participants regardless of subgroup and condition [see **Appendix E** for Session Introduction].

Study Scripts
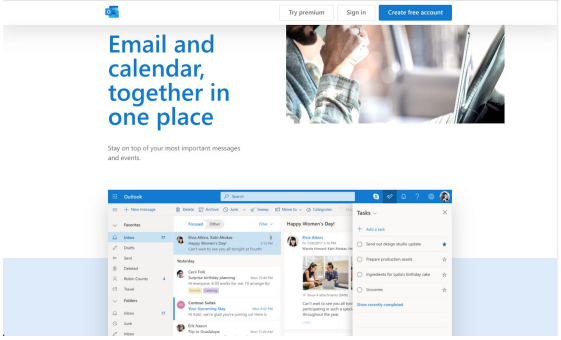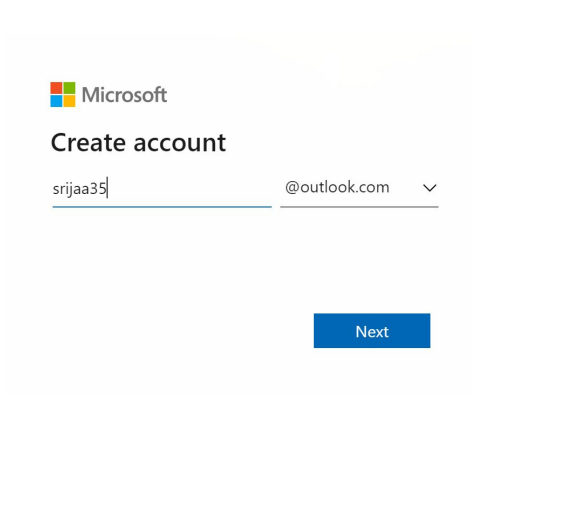
Two scripts were developed for this study: one for average users and one for power users. Each script focused on tasks that were more common to their specific type of user. Average users were given basic tasks like signing up for an email account and sending an email as well as slightly more complex tasks while power users were given access to pre-populated email accounts to do higher-level organization tasks.

Each script began with some preliminary questions, both to gauge the participant's skill level using Outlook.com and as a way to help the participant get more comfortable. The question to find which browser the participant typically uses also allowed us to ensure the browser the participant used during our study was the one they were most comfortable with. A number of goal-based and task-based activities and subsequent questions followed, with a free play time block and a final impressions interview to wrap things up [see **Appendix F** for Scripts].

A list of all activities that the participants did is included here along with a brief explanation on what we hoped to learn about specifically, as well as a representative screenshot depicting what part of the interface the participant was expected to be interacting with. Each activity was

presented to the user both verbally and in written form via a card that was given to the user after the moderator read the activity out loud. **Appendix H** has a full list of task cards that were given to the users.

Average Users

#	Task/Activity	Sample Screen
1	Get initial impressions of Outlook.com based on the sign up marketing page **What we hoped to learn:** We wanted to discover if users thought Outlook.com was feature-rich and appealing enough to create an account. Also if Outlook.com was doing a good job of selling the Premium version to users; were they aware that it exists and what features it has?	
2	Create a new account on Outlook.com **What we hoped to learn:** We wanted to find out if users experienced any issues or frustrations signing up that might cause them to abandon the process and thus be contributing to the lack of new Outlook.com users.	

3	Set up the Outlook.com account **What we hoped to learn:** We wanted to discover if users of competitor products could easily find all the features or options they were looking for or if they struggled to find things. Additionally, do all of the expected features/options exist? We hoped to see if Outlook.com users remembered where options/features were or if it is intuitive enough that they didn't struggle.	

| 4 | Add a signature

What we hoped to learn:
Adding a signature is a very common task and we were concerned that it is lacking visibility and discoverability in Outlook.com; were users able to find it or did they get frustrated? | |

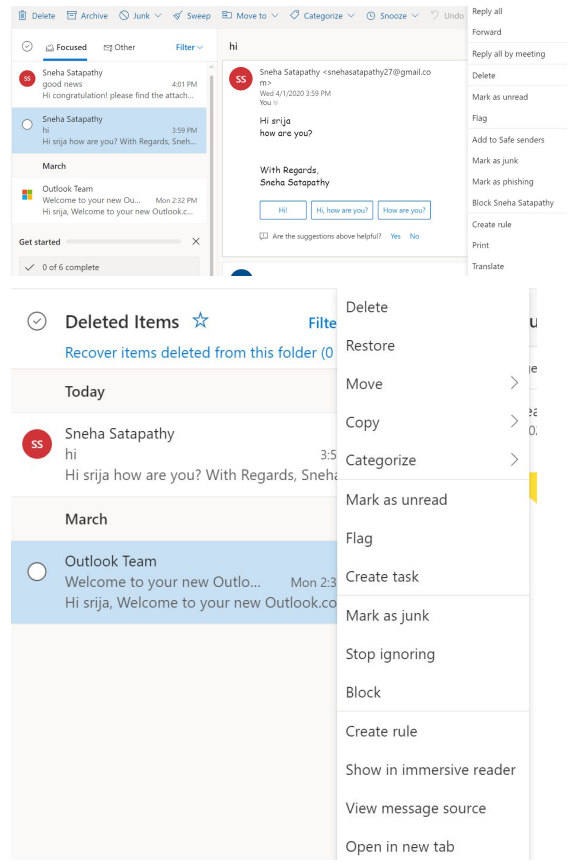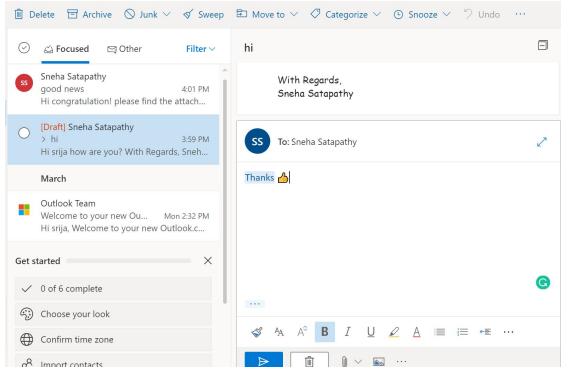| 5A	Send an email with an attachment **What we hoped to learn:** Sending an email is the litmus test of email applications. If users struggled to do this, that's a very bad sign and we needed to capture what was causing them difficulty so we could make design recommendations for changes.	
5B	Delete and recover an email **What we hoped to learn:** We wanted to find out if the interface was intuitive enough and easy enough to use that users could find the trash can and figure out how to recover the email.	

5C	Reply to an email using rich text formatting **What we hoped to learn:** We wanted to find out if the interface was intuitive enough that users could find how to add emojis and format the text. Additionally, were users curious about the paint brush icon on the far left of the formatting panel?	
6	Create a folder and put similar emails in that folder **What we hoped to learn:** We wanted to know how quickly users could figure out that folders were a primary way to organize the Outlook.com inbox, and thus, if sorting into folders was an intuitive action that users expect.	

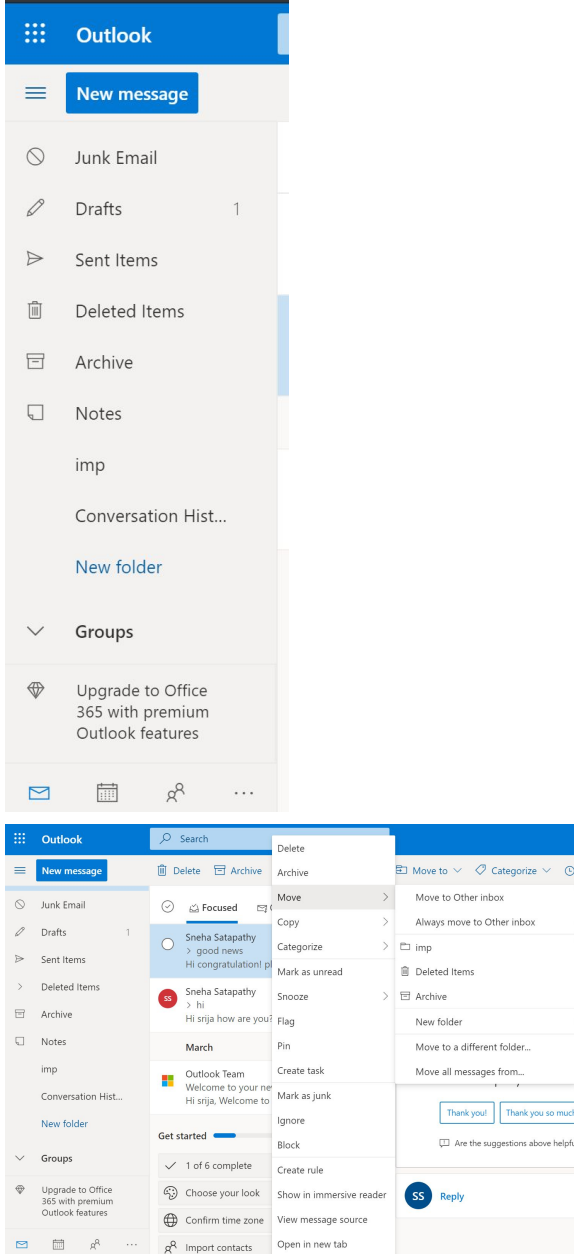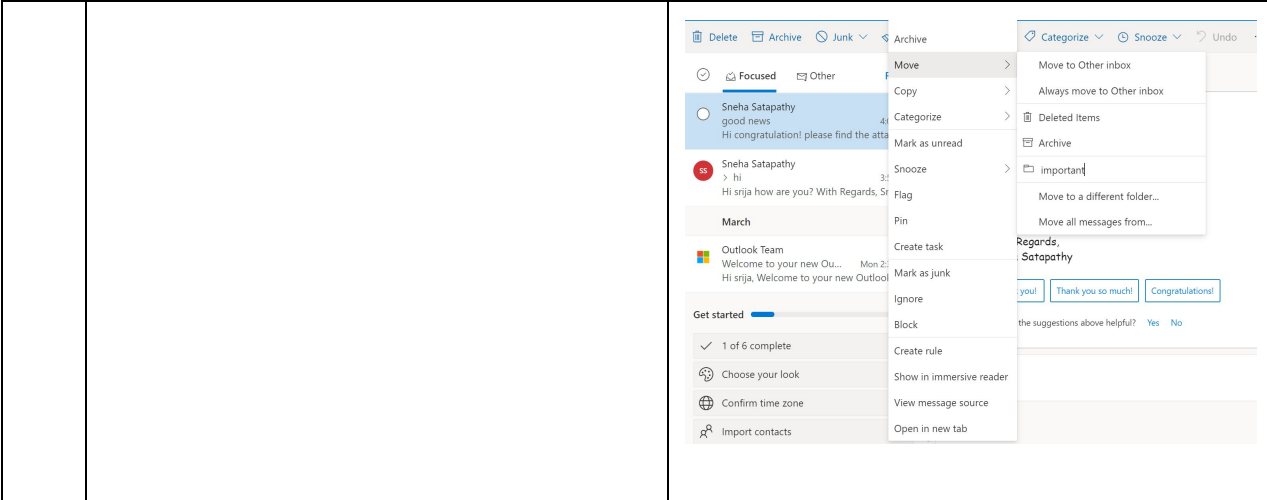|		
7	Add contacts **What we hoped to learn:** Adding a contact is a very common task we were concerned that could be lacking visibility and discoverability in Outlook.com; especially as it is categorised under people. Hence we were concerned if users were able to find it easily or get frustrated.	
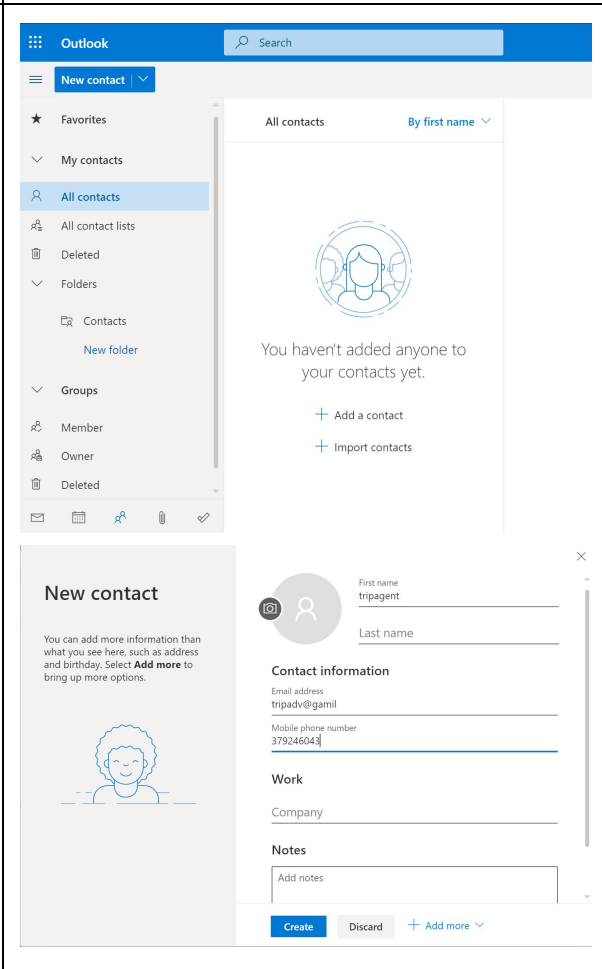
| 8 | Add a new calendar event.

What we hoped to learn:
We wanted to know if the calendar had enough visibility in the interface that users were able to locate it, and once they did, if the usability was as expected. | |
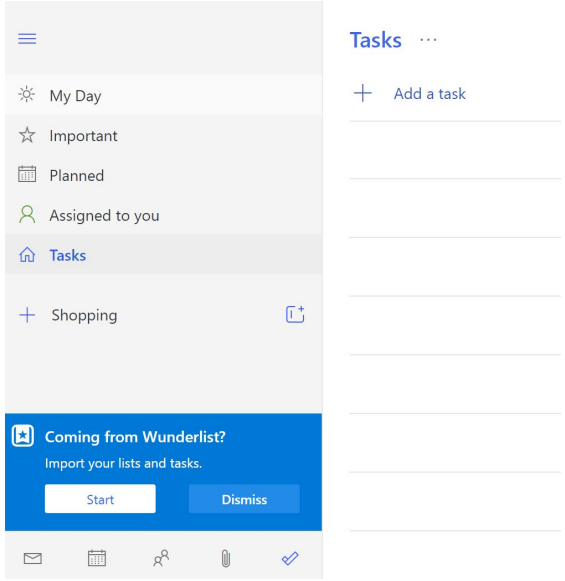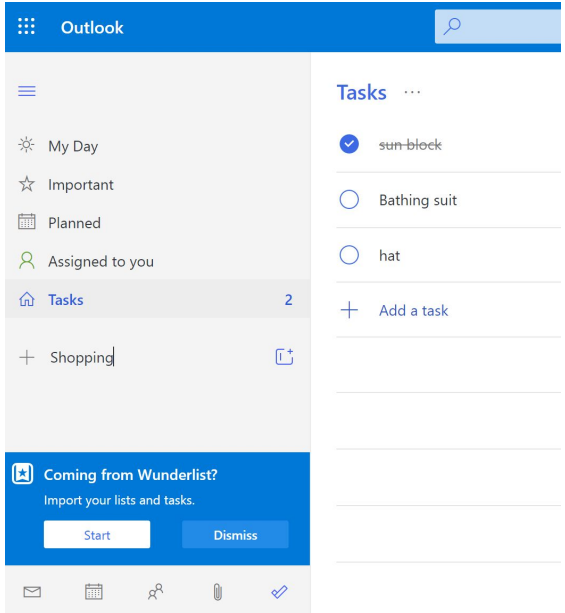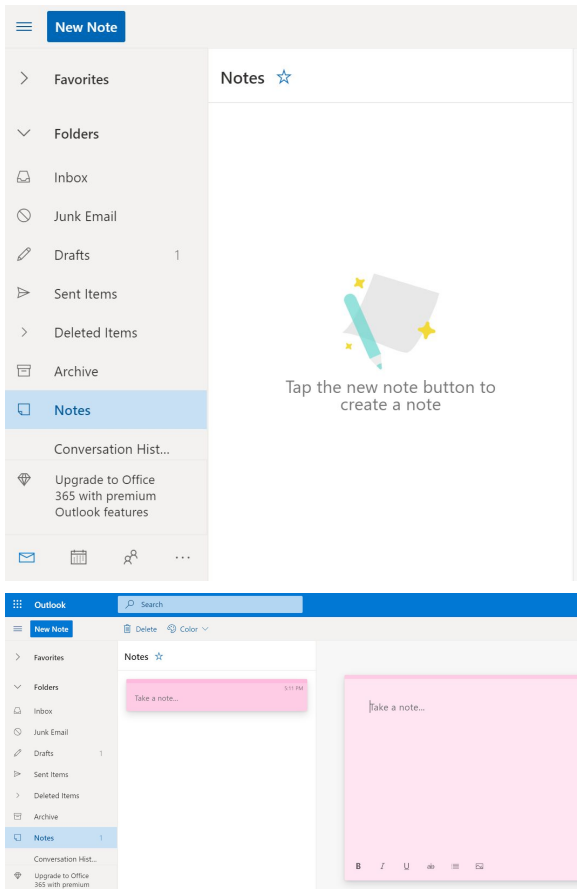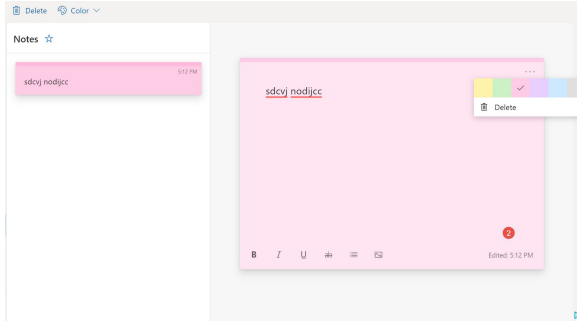
9A	Make a shopping (to do) list **What we hoped to learn:** We wanted to see if the "to do" list has enough discoverability and visibility in the interface, and if it's even something that users were expecting to have in their email application.	

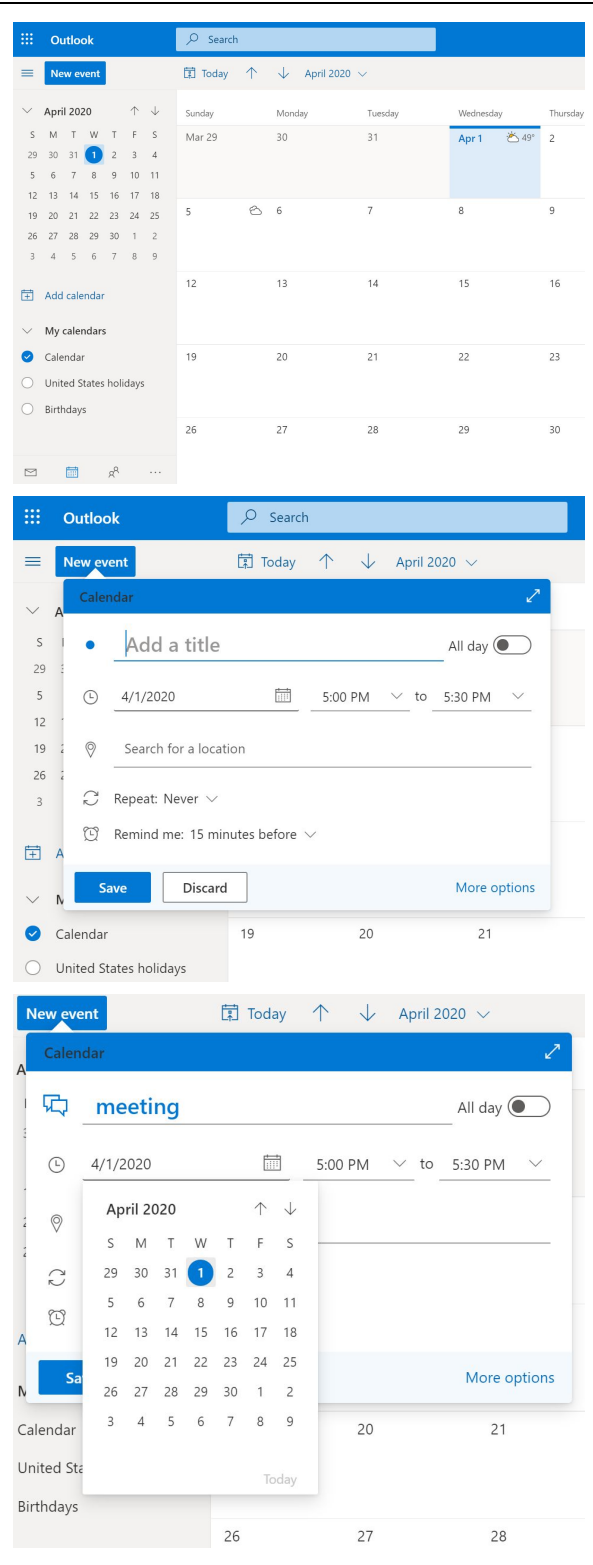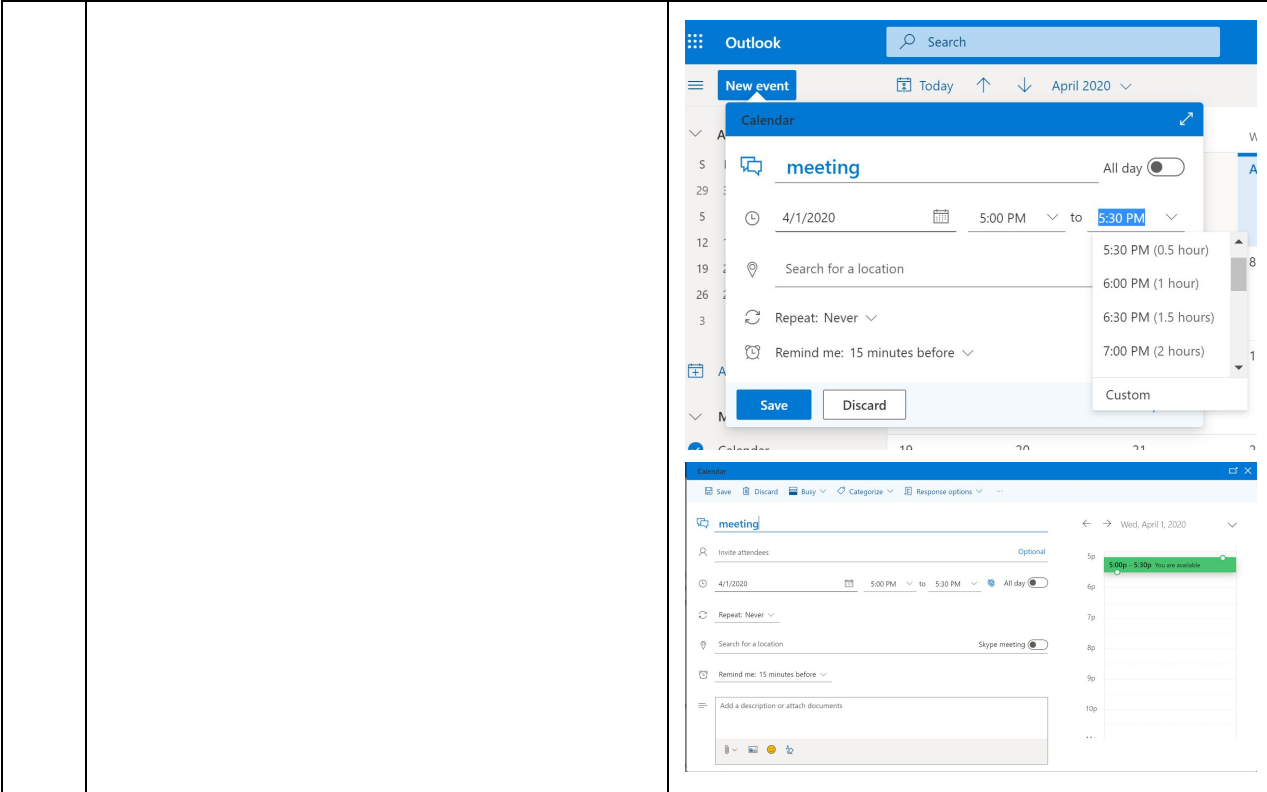| 9B | Mark an item as complete.

What we hoped to learn:
As the to do list is not necessarily an expected email feature, we wanted to ensure that it was working as users expect. | |

10A	Make a note **What we hoped to learn:** We wanted to know if the notes had enough visibility in the interface that users were able to locate it. Were they immediately aware that they could create notes?	
10B	Remove the note **What we hope to learn:** As the notes were not an expected email feature, we wanted to ensure that it was working as users anticipated.	

| 11 | Set an away message (automatic reply)

What we hoped to learn:
Setting an away message is a very common task and we were concerned that it is lacking visibility and discoverability in Outlook.com, particularly because the grammar used for the feature does not match the usual vernacular. | |

Power Users

#	Task/Activity	Sample Screen
1	Get initial impressions of Outlook.com based on the sign up marketing page (for competitor power users only) **What we hoped to learn:** We wanted to discover if users thought Outlook.com was feature-rich and appealing enough to create an account. Also if Outlook.com was doing a good job of selling the Premium version to users; were they aware that it exists and what features it has?	
2	Log in **What we hoped to learn:** This is a necessary step to use the website, and could show usability issues as they attempted (and possibly failed) to log in.	

3	Set up the Outlook.com account **What we hoped to learn:** We wanted to discover if users of competitor products could easily find all the features or options they were looking for or if they struggled to find things. Additionally, do all of the expected features/options exist? We hoped to find if Outlook.com users remembered where options/features were or if it was intuitive enough that they didn't struggle.	
4	Add a signature **What we hope to learn:** Adding a signature was a very common task and we were concerned that it was lacking visibility and discoverability in Outlook.com; were users able to find it or did they get frustrated?	

5	Reply to an email using rich text formatting **What we hoped to learn:** We wanted to find out if the interface was intuitive enough that users could find how to format the text and if they could find and understand the "format painter" feature.	

6	Organize the email account using folders, rules, categories, etc **What we hoped to learn:** We wanted to find out if the organizational features in Outlook.com were what power users expected, if they worked as expected, and if they were intuitive enough to use.	
7	Add contacts **What we hoped to learn:** Adding a contact is a very common task and we were concerned that it is lacking visibility and discoverability in Outlook.com, especially as it is categorised under people. Were users able to find it easily or did they get frustrated?	

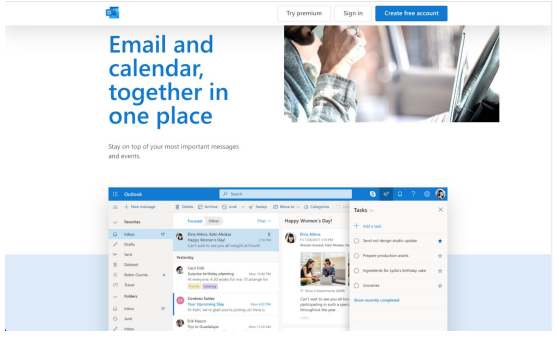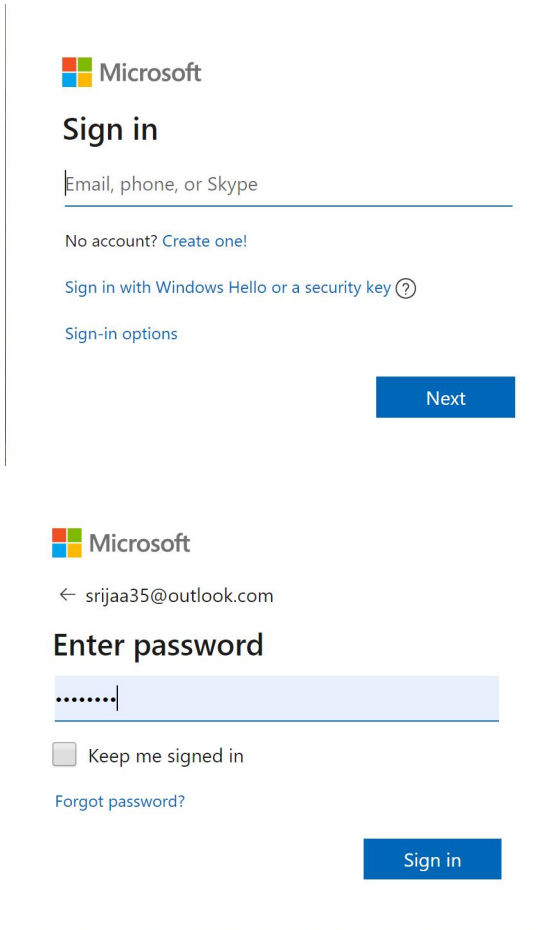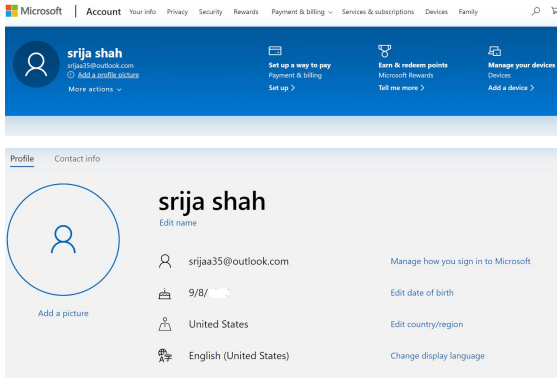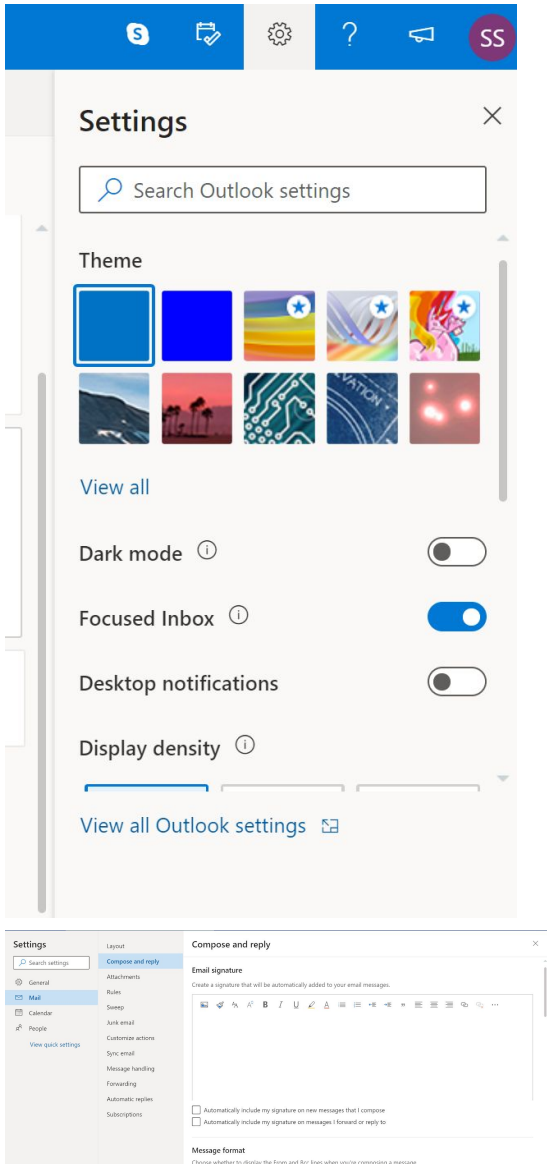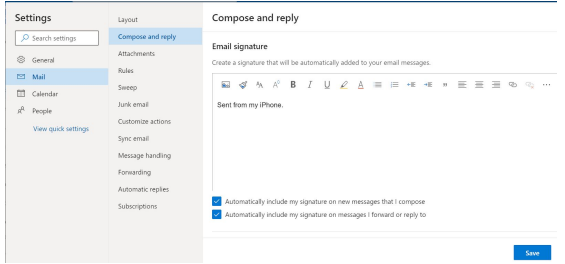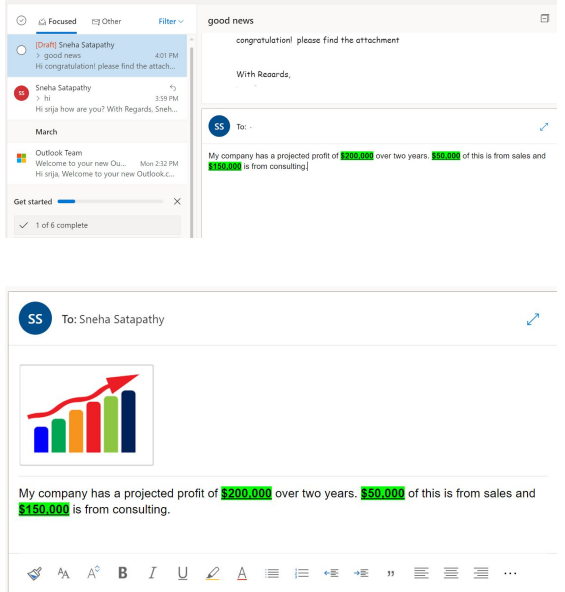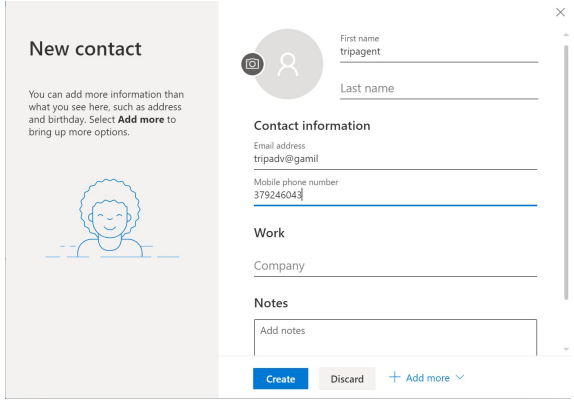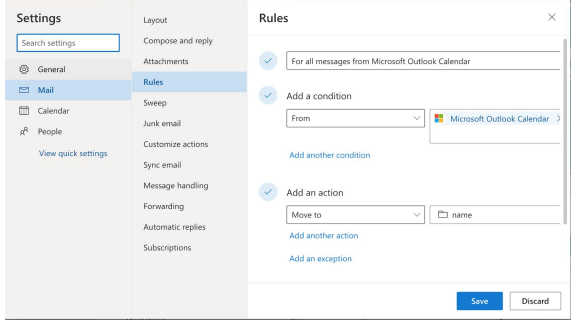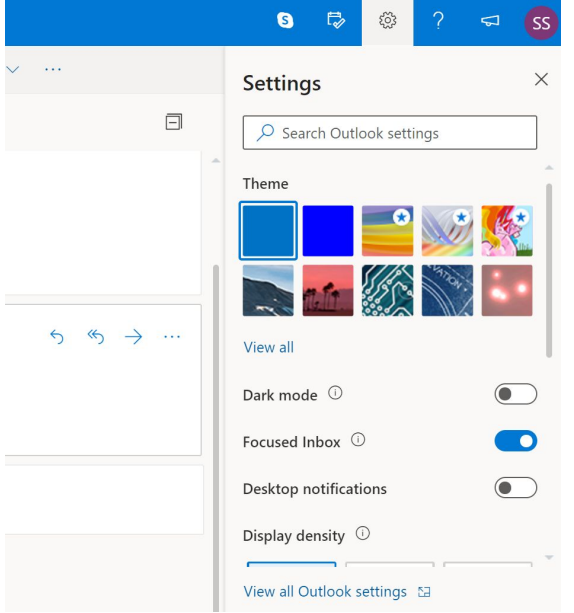|			
8	Automatic email sorting (rules) **What we hoped to learn:** We wanted to know if rules were intuitive or if they were too difficult to discover and use. This is one of the major tools in a power user's toolkit; being able to seamlessly set up automatic email organization is important.		
9	Set an away message (automatic reply) **What we hoped to learn:** Setting an away message is a very common task and we were concerned that it is lacking visibility and discoverability in Outlook.com, particularly because the grammar used for the feature does not match the usual vernacular.		
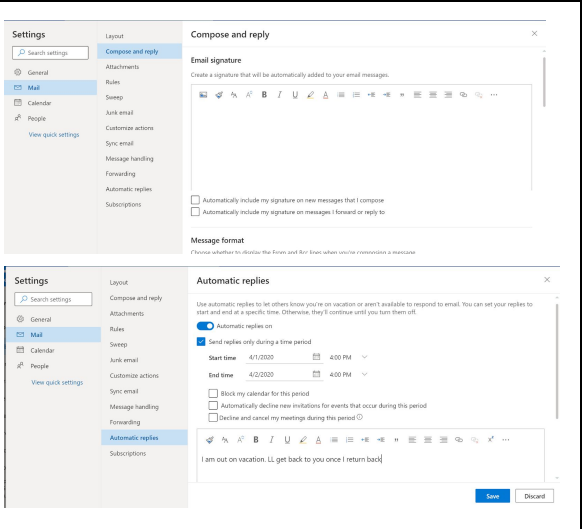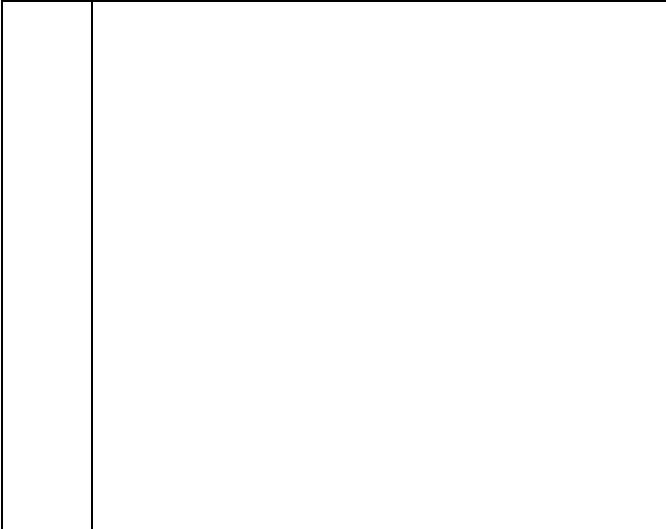
10	Set up a recurring calendar event
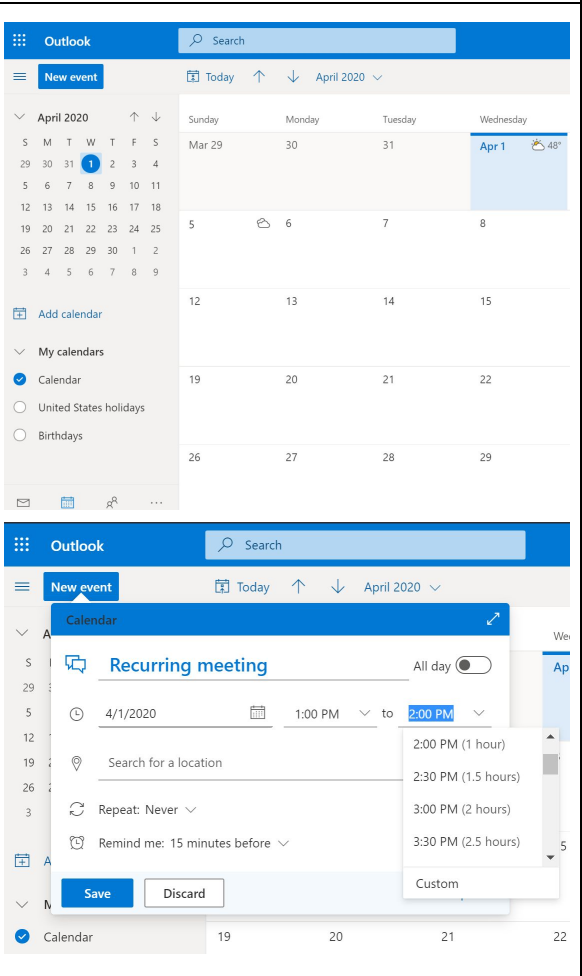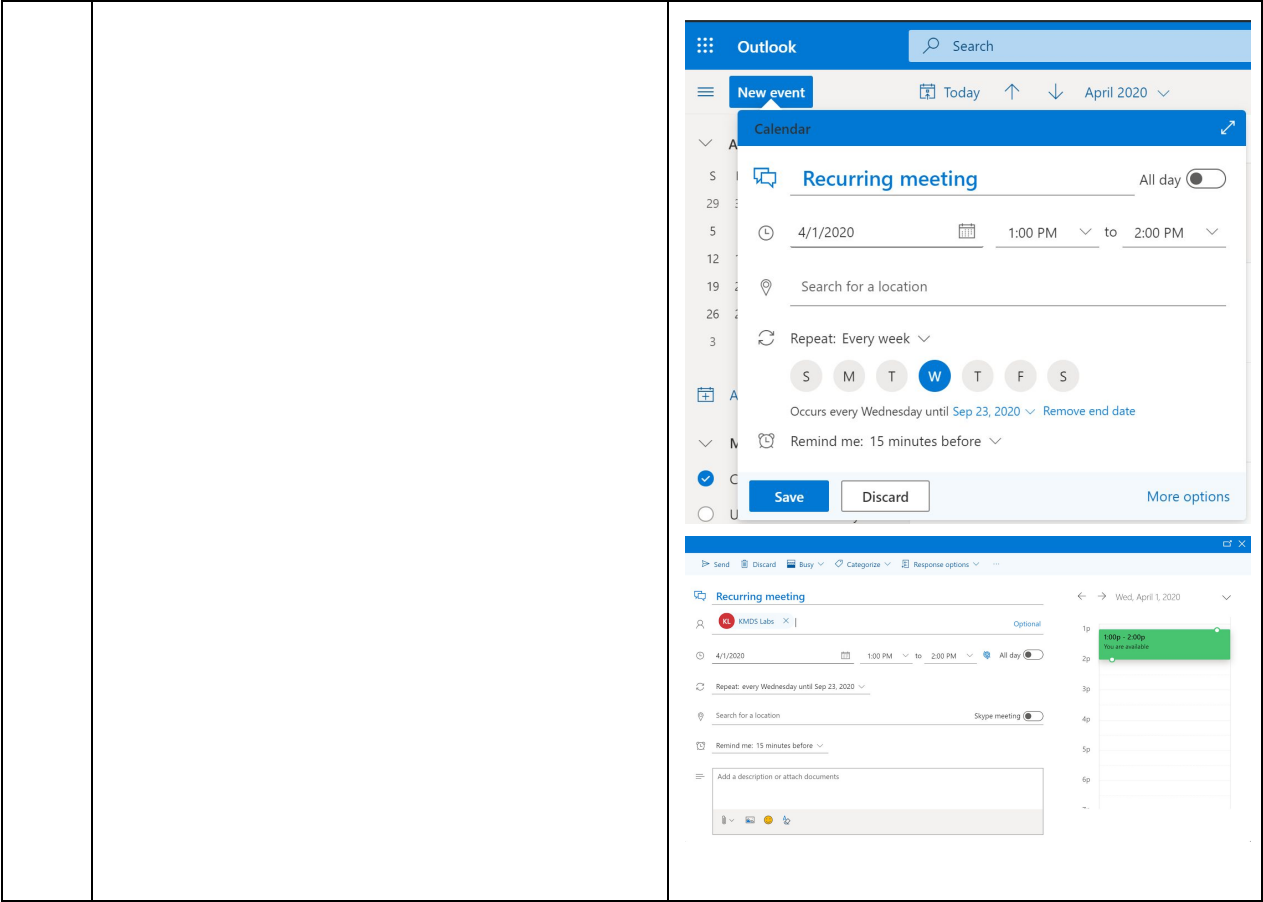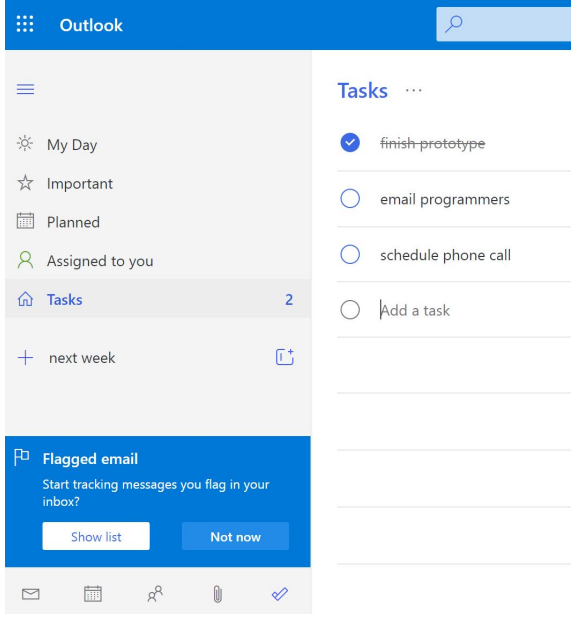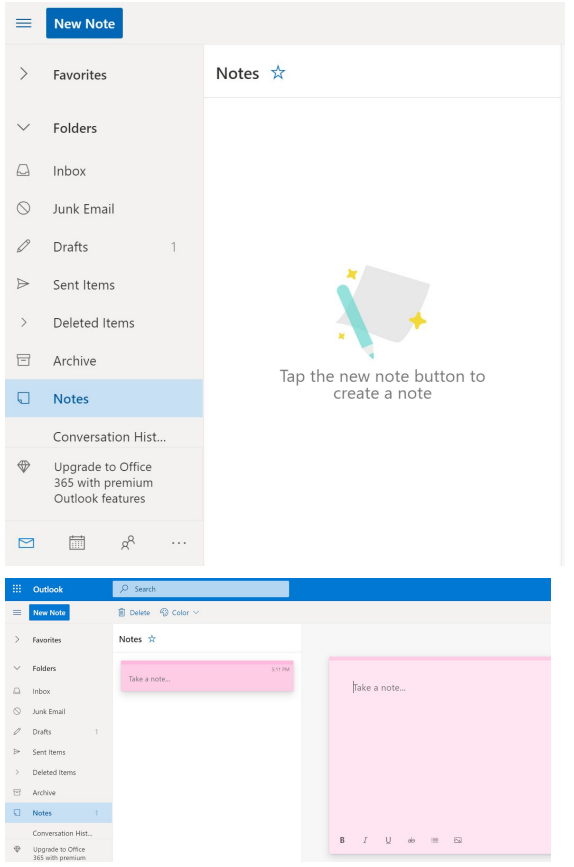
What we hoped to learn:
We wanted to know if the calendar had enough visibility in the interface that users were able to locate it, and once they did, if the usability was as expected. |
 |

| 11A | Make an agenda (to do list)
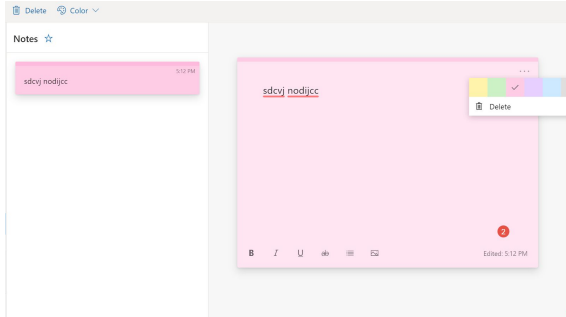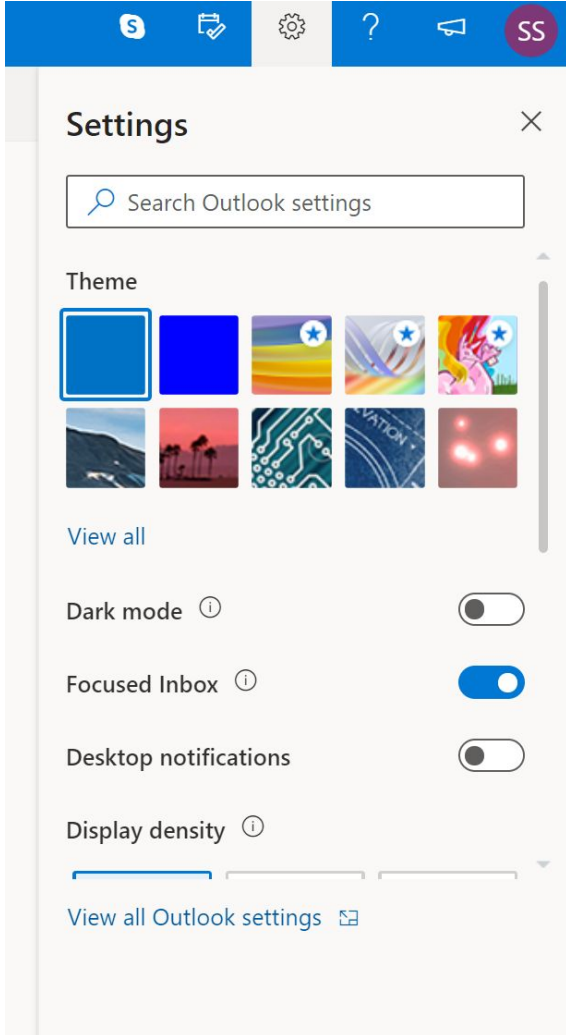
What we hoped to learn:
We wanted to see if the "to do" list has enough discoverability and visibility in the interface, and if it's even something that users were expecting to have in their email application. | |

11B	Mark an item as complete **What we hoped to learn:** As the to do list is not necessarily an expected email feature, we wanted to ensure that it was working as users expected.	
12A	Make a note **What we hoped to learn:** We wanted to know if the "notes" have enough visibility in the interface that users were able to locate it. Were they immediately aware that they could create notes?	

12B	Remove the note **What we hoped to learn:** As the notes were not a typical email feature we wanted to ensure that they are working as users expected.		
13	Receive an email from a different email account **What we hoped to learn:** We wanted to find out if the interface is intuitive enough that users could easily set up their Outlook.com account to receive email from different accounts.		
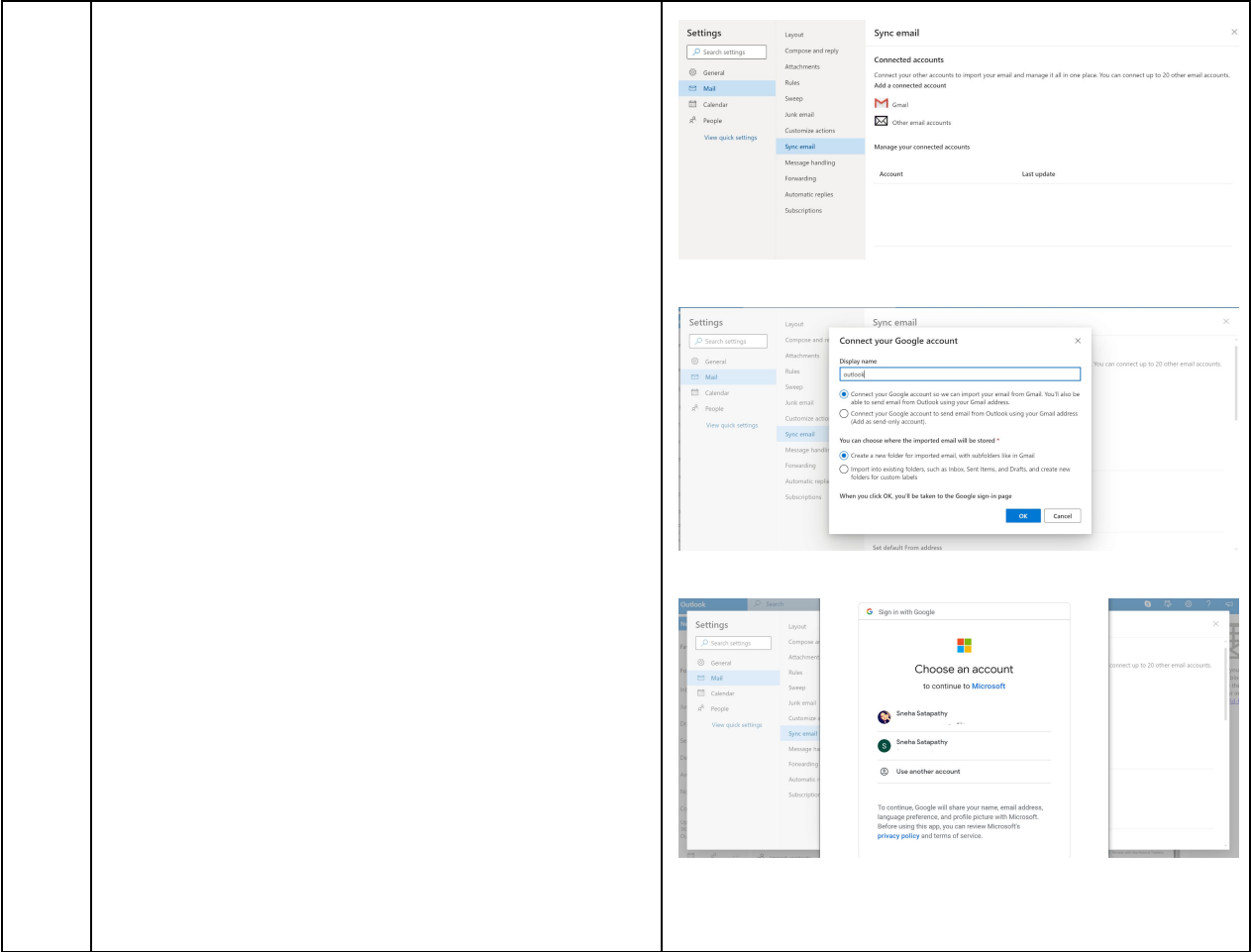
Metrics and Measures

Three main usability metrics were chosen to be measured and analyzed in this study: performance measures, behavioral measures, and subjective measures. These metrics can provide key insights into user experience issues by covering different dimensions of user actions, attitudes, and behaviors. Additionally, we planned a number of knowledge and perception probes to gauge if participants understood various features of the product and if it met their expectations in terms of visual appeal, ease of use, and more. By combining all of these measures we gained an understanding of the product's overall usability issues and developed answers to our aforementioned study objectives.

Performance Measures

Performance measures are quantitative measurements of participant actions, typically the time it takes to complete an action successfully and the efficiency of task completion. These measurements can be used later for comparisons among participants. We measured the following:

- **Task completion time** - the time it took participants to complete a task helped us gauge if certain features have high or low visibility, discoverability, or adherence to consistency and standards.
- **Task success** - we didn't only mark when tasks are complete; we also asked the participant to tell us if they think they successfully completed a task. Including both components in task success helped us understand if the process was clear to the participant.
- **Correct responses** - did participants answer knowledge probe questions about product features and functionality correctly? A high percentage of correct responses indicates that the product is doing a good job of relaying its features via the interface.
- **Help utilized** - we captured how many times the participant accesses the integrated Outlook.com help to glean if a certain feature or function was not adequately explained via the interface.

Behavioral Measures

Behavioral measures are qualitative in nature; they are usually verbal or physical reactions participants had while using a product. Behavioral measures were derived from observations made by the moderator and data logger. If a participant was sighing, making irritable remarks, or scrunching their face, it may have indicated that the participant found this particular task or product frustrating. Measuring these aspects of the participant allowed us to capture aspects of the user experience that perhaps the user didn't discuss with us, or maybe wasn't even aware of! Our behavioral measurements included:

- **Verbal utterances** - whenever the participant unintentionally said something, such as an exclamation, grunt, or sigh, we logged that along with the mood the participant appeared to be in to help us understand if, for example, the participant found a task frustrating, confusing, or was proud of themselves for completing it.
- **Facial expressions and/or body posture** - noting the participant's expressions and body language helped us gauge the participant's internal feelings about a task. Facial expressions were fairly easy to read, but body posture can give us clues about other aspects of the participant such as concentration (was the participant sitting stiffly, staring intently at the screen?) and confidence (did the participant relax while working on a task or become more rigid?).
- **Paths taken** - by documenting the paths, we tracked how well participants were able to complete a task—completing a task successfully does not mean that the participant didn't struggle with it! While the time on task metric gave us a similar insight, documenting the navigation paths helped us narrow down where the participant became confused by the product's interface, and led us to potential suggestions for improvement.
- **Mouse hovers** - mouse hovers can indicate confusion or an internal struggle in participants as they try to decide where to go in the product and if they're making the correct decisions to complete their task.

Subjective Measures

Subjective measures were additional qualitative measures that considered how people felt, experienced, and thought about the product. Many questions in our script, for example, contain rating scales that allowed users to rate and express how difficult they found that particular task [See **Appendix F** for the specific rating scale questions we ask]. Another subjective measure of the participant we obtained was during error debriefing discussions. During an error debrief, a participant was invited to describe what they think happened. The words they used to describe what occurred could often be clues to their experience of the product and the task. For this reason many of our questions were open ended, which gave participants an opportunity to describe the product in ways we may have not considered. Lastly, we ended sessions with a question that asks if there is anything else they think we should know. This allowed participants a chance to express any final thoughts they may have had about the product that aren't structured or limited by the question itself.

Knowledge and Perception Probes

A good script should also include knowledge and perception probes. Knowledge probes test participants on their ability to correctly recognize behaviors of the interface. In addition to including performance measures, knowledge probes allowed us to determine if the user noticed the interface's feedback and learned how to correctly perform a task. While users may be successful in completing a task, it does not guarantee that they completed it the correct way, or the most efficient way.

Perception probes deal with the subjective reaction and understanding a user has to the product. Users may be successfully completing a task using your interface, but perhaps they felt the task was very challenging, or the website felt old and behind on current design language. Perception probes allow us to understand the subjective responses users may be having to a product, which influences their user experience.

Examples of key facts we believe a user should realize, and thus asked via knowledge probe, included:

- When an email has been sent
- Where the inbox is
- What emails have and have not been viewed
- Where to view emails that have been saved for later use
- How to delete emails
- How to recover deleted emails
- How to search for emails
- How to access other features offered by Outlook.com like calendar, lists, and notes
- What unique Outlook.com features like "Sweep" do

Examples of perceptions we queried participants on included:

- Outlook.com's ease of use
- Level of interest in Outlook.com premium
- Outlook.com's visual appeal
- If Outlook.com has a comparable set of features compared to competitors

As we described in our philosophy section previously, the combination of all the metric data along with our researchers' expertise in crafting actionable insights from data allowed us to cover all aspects of user behavior, and in turn, create a set of recommendations that we are confident will result in a greatly improved user experience.

Findings

Protocol Deviations

The original protocol called for twenty participants and an in-person study. Due to the coronavirus quarantine, we were forced to perform a remote usability study instead. As a result, both the number of participants, as well as the methods of conducting the study, changed. We ended up running the study with 6 participants: four average users and two power users. Of these participants, all were competitive users aside from one Outlook.com power user. Due to the difficult nature of finding Outlook.com primary users and the greater potential for insights from competitor users, we went forward with the 6 participants as follows:

Total Participants: 6		
Condition / subgroup	average	power
Competitor user	4	1
Outlook.com primary user	0	1

The study procedures were also changed to accomodate the remote nature of the study. Much of the script verbiage was modified, some due to increased difficulty in hearing the difference between certain words, (e.g. dissatisfied and satisfied) and others due to the inability of having physical props. One of the major changes was combining freeplay time with the "setup account" task; we quickly discovered that participants were using that time as a sort of free play anyway to explore the interface and doing so ensured sessions would not run over time. It was more difficult to wrangle participants remotely than an in-person study so we felt that this was an acceptable compromise. Overall, however, we felt that we were able to maintain the key tasks in keeping with the spirit of the study and gather enough participant data so we could develop major insights and recommendations.

Findings by Component

Outlook.com Homepage

We asked competitor participants to look at the Outlook.com marketing—or home—page to ascertain how well Microsoft did in portraying the features of the web application, and as well the benefits of their premium version of Outlook.com.
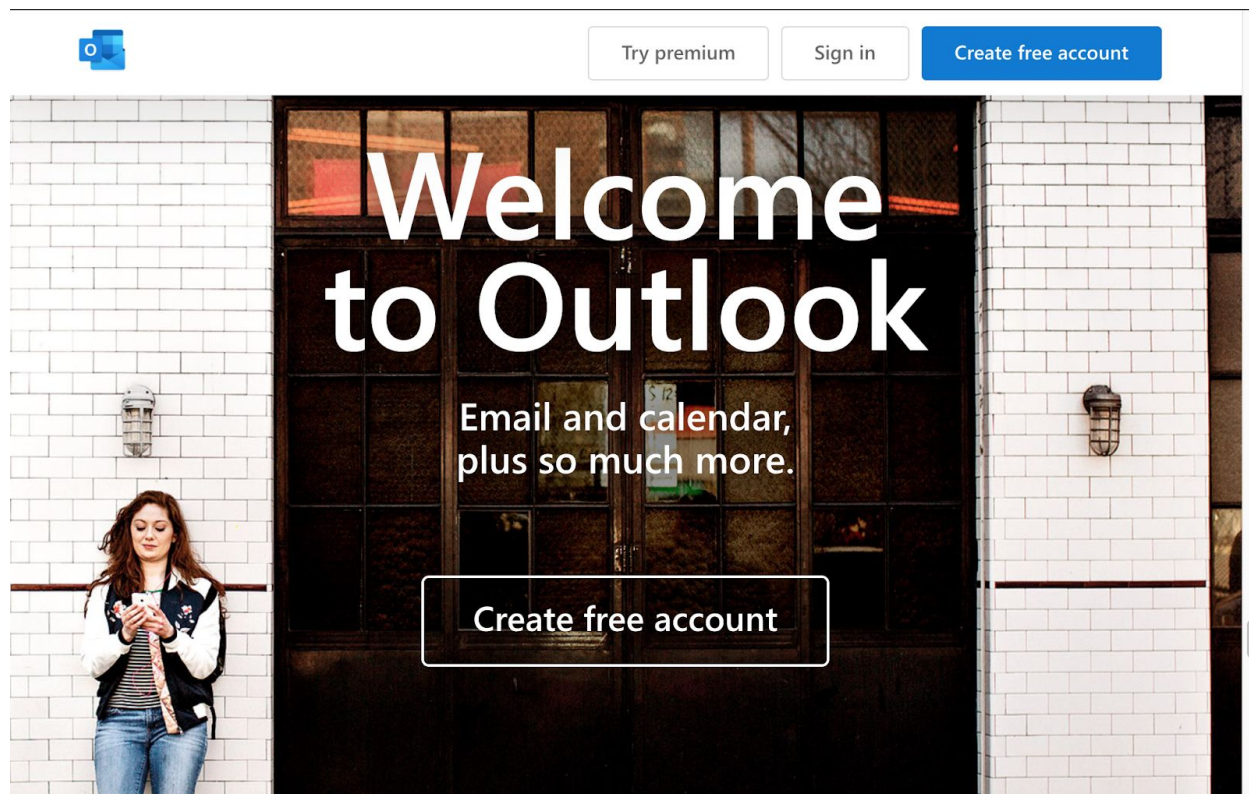
The Outlook.com marketing page (Outlook.com)

During our heuristic evaluation, we identified a few issues with this page, particularly since converting users to Premium accounts was one of the goals of Clippy, inc. The premium version of Outlook.com was described as having the following features:

- Ad-free interface
- Custom domains
- Enhanced/advanced security features
- Full desktop version of Office
- Latest versions of Word, Excel, and PowerPoint
- 1 TB cloud storage

Image	Issue Description
	The Outlook.com marketing/intro page itself is very long and requires a lot of scrolling. It's unlikely users will take the time to read through the entire page. Even if someone does read through it, much of the information will be overlooked. This page has questionable **value proposition**.

	The Premium button is given fairly high visibility, but the benefits of premium are at the bottom of the website, which means it has poor **discoverability**.
	The only other location that premium information is located has low **visibility** due poor contrast in the choice of colors.

What this could mean: Overall, our concern was that new users would not have a great idea of what features Outlook.com contained and would not be sold on creating a new account. Additionally, we felt that users would not notice the Premium version or its features.

Task 1 - Initial Impressions

Participants were asked to navigate to Outlook.com and spend a few minutes reading this page.

Metric	P1	P3	P4	P5	P6
Participant Type	Competitor, Average	Competitor, Average	Competitor, Power	Competitor, Average	Competitor, Average
Knowledge Probe: main features of Outlook.com.	0/5	3/5	1/5	1/5	5/5
Perception Probe: are the features the same as their current email provider?	Y	Y	Y	Y	Y
Perception Probe: is there a premium version?	N	N	Y	Y	Y
Knowledge Probe: features of the premium version.	0/6	0/6	2/6	2/6	2/6
Perception Probe: interest in the premium version from 1-7 (1=not at all, 7=very)	1	5	2	5	4
Subjective: Why give that score for interest in premium?	"I still don't want to give data to Microsoft."	"Indifferent"	"The only appealing thing is the storage."	"Depends on the cost."	"Enhanced security is good but I'd expect some additional features."
Perception Probe: How many ads do you think would be acceptable?	"The # doesn't matter if they're contained to one area."	"Zero"	"I don't care, I use adblocker"	"Depends on type of ad" (e.g. popup)	/
Perception Probe: Is Outlook.com visually appealing?	Y	Y	Y	Y	Y

Performance Findings: Participants did not have a high success rate when answering the knowledge probe. While most participants (4/5) gave at least one correct response to the question about the features that Outlook.com had, none of the participants could give more than two correct responses when asked about Premium Outlook.com's features.

Subjective Findings: All of the participants (5/5) seemed to think that Outlook.com had the same feature set as their current email application, even if they could not answer what all of the Outlook.com features were. Two out of five participants (2/5) were unaware that the Premium version of Outlook.com existed, but interestingly enough, after being told all of the Premium features the scores for interest varied wildly even though participants didn't have anything positive to say about it. Participants also seemed largely indifferent to ads, with only one participant (P3) specifying that she did not want to see any ads in the application.

Analysis & Conclusions: Participants generally seemed to like the Outlook.com look and the features provided with a free account. The marketing page perhaps doesn't do a terribly good job of selling the Premium version and its features since none of the participants had anything positive to say about it. We attribute much of that to the low visibility of the Premium content on the page.
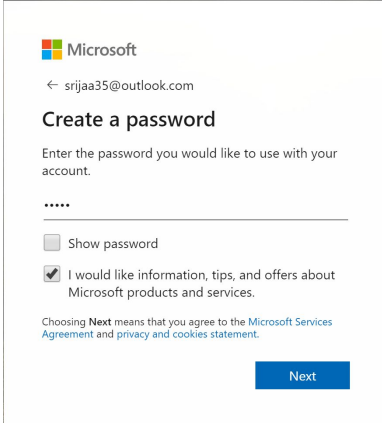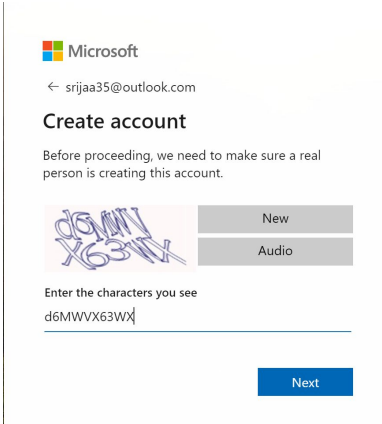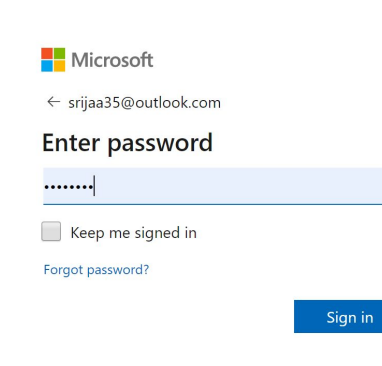
See our **Recommendations** section for guidance on how to improve the Outlook.com landing page.

Outlook.com Landing Page | **Grade: B-**

The landing page does a decent job of presenting the primary features of Outlook.com. However, the Premium content seems like an afterthought since it is located very far down the page and/or called out with low contrast text. The only other concern is that the page isn't very "fun" - it portrays a very business-like feel which might not be the best approach for a personal email client.

Register or Sign in

Creating an Outlook.com account does not require many steps but there were a few issues we discovered that could result in errors and frustrations.

Image	Issue Description
	Choosing an inappropriate password (e.g. something deemed "too common") will trigger an alert and prompt for a new password only after completing the next step in the registration process (adding a birthday). This lacks **cross-pollination** because the user will need to re-enter information.
	We found the captchas to have poor **readability** and to be prone to error.
	There is no way to see the password when signing in, although the option is given during the registration process. This process has poor **transparency**.

> **What this could mean:** If users become frustrated during the registration process, they might cancel their sign-up and not come back. Similarly, a frustrating experience while logging in might sour a user's feelings on the product, causing them to not use it.

Task 2 (Average Users) - Register for an Outlook.com account

Average users were asked to register a new account on Outlook.com. They were informed that they did not need to use their actual name, age, or any other personal info.

Metric	P1	P3	P5	P5
Participant Type	Competitor, Average	Competitor, Average	Competitor, Average	Competitor, Average
Time on Task	2:42	5:58	1:47	2:19
Errors Encountered	4 - username taken, password unacceptable, captcha incorrect twice	3 - clicked "sign in" instead of "sign up," chose a username that was taken, received an error that she needed to sign out to see the organization email.	1 - password unacceptable	0
Behavioral	Was frustrated by the captcha; groaned.	Sighed.	Uttered a low, frustrated "what?!"	Long delays between typing the captcha letters, lots of hovers in between letters and fixing required.
Perception Probe: Was it easy to register?	Y	Y	Y	Y
Subjective:	"I hate the	"The questions	"The captcha	"The only hard

Thoughts on registration	captcha"	were straightforward"	was hard to read"	part was filling in the random letters"
Subjective: Satisfaction with registration process from 1-7, 1 being not at all and 7 being very satisfied.	4	6	7	6

Task 2 (Power Users) - Log in to Outlook.com account

Power users were asked to sign in to an existing account on Outlook.com. They were given the username and password for this task.

metric	P2	P4
Participant Type	Outlook.com, Power	Competitor, Power
Subjective: What would you change about the login process?	"Nothing, it was straightforward."	"The two-step verification was annoying."
Behavioral	No utterances, etc.	Frustrated "Really?!" when the prompt for a phone number occurred.

Performance Findings: 3/4 participants were able to complete the registration process in less than 3 minutes. One participant (P3) ran into a strange issue that we are not sure the cause of; seemed to be related to another account she might have had. Without this issue, she would have completed the task in about 2 minutes.

Errors Observed: 3/4 participants ran into issues while registering for an account. 2/4 participants registering for an account ran into captcha issues, where they did not successfully complete the captcha on the first attempt. 2/4 participants registering for an account put in a password that the system deemed unacceptable. 1/4 participants attempted to sign in instead of

registering for a new account, and that same participant (P3) also tried to choose a username that was taken.

Subjective Findings: Even though 3/4 participants ran into an issue registering for a new account, 4/4 gave a positive response to the question "Did the registration process feel easy to do?" Most of the participants (5/6) responded with some variation of "it was straightforward" for both the registration and login tasks. 3/4 participants had an issue of some kind with the captcha, with the most negative comment amongst participants being P1: "I hate the captcha." 3/4 participants gave a high score on the satisfaction scale. The power users who logged directly into the account instead of registering for a new account also had very few issues logging in; one user (P4) ran into the forced two-step verification process which actually had nothing to do with the login process and will be detailed in the next task.

Behavioral Findings: The behavioral data is somewhat at odds with the verbal responses participants gave: 4/4 participants registering for a new account displayed some kind of negative reaction during the registration process. 3/4 participants had an utterance of some kind: sighing, groaning, or exclaiming. One participant (P6) displayed uncertain hover responses during the captcha completion, indicating that he was not sure if the letters he was typing were correct.

Analysis & Conclusions: While the participants seemed to believe that the registration process was simplistic and straightforward, our gathered data did not agree. This seems to indicate that the registration process was not as smooth as it could be and that there is room for improvement, particularly related to the captcha's readability. Overall, participants did seem largely fine with the number and type of questions that they were asked during the registration process. Power users logging into an account did not experience any issues related to the login process, which surprised us only in that we thought a lack of a password visibility feature would be a cause of frustration. However, running this as a remote study meant that users could copy and paste the username and password and thus lower the potential for error.

See our **Recommendations** section for guidance on how to improve the Outlook.com registration and login process.
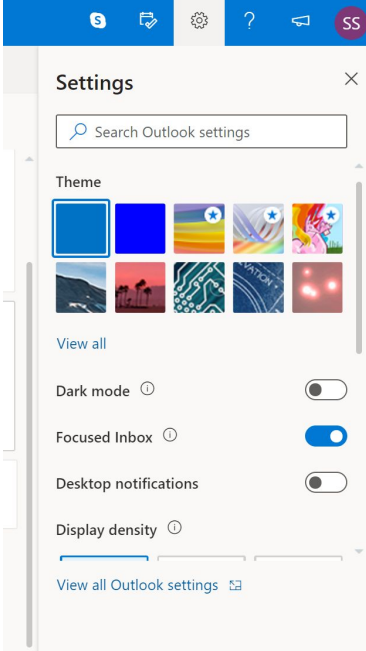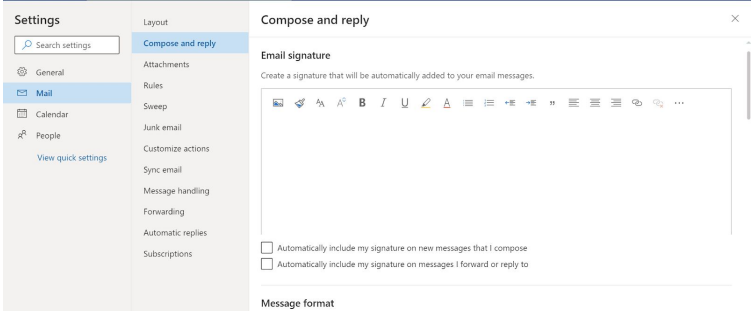
Registration & Log In | **Grade: C**

Too many participants had issues with the captcha during the registration process; one participant had to enter it four times to be able to register an account. This indicates strong readability issues. Feedforward was also an issue, as participants who input an incorrect password (which the system both failed to notify the user of until more steps were taken, and also did not tell the user in advance what the password rules were) had to re-enter personal data. There was another lack of feedforward in that users were not told how many steps there were in the registration process. While participants did not experience issues during the login process, there was definitely a possibility for error as previously described.

All of these issues combined do not make for a good user experience, which is of the utmost importance when introducing users to a new system.

Set up the Account

There are a number of ways to set up and personalize an Outlook.com account. We were interested to see if users might have issues finding certain features (e.g. signature or layout options) since there are so many options.

Image	Issue Description
	Are these settings deemed useful or do they get in the way of settings users actually want to use? Since users cannot modify these options, it is lacking in **flexibility**.
	There are a lot of settings listed, and they aren't necessarily in order of what users would find important. What users are looking for may lack **visibility**.

What this could mean: If users cannot find the settings they want to change, they might become frustrated and/or think that the application is not as feature-rich as it actually is.

Task 3 (Competitor Users) - Set up Outlook.com account

All competitor users (both power and average) were asked to set up their account on Outlook.com. They were given 5 minutes to do so.

Metric	P1	P3	P4	P5	P6
Participant Type	Competitor, Average	Competitor, Average	Competitor, Power	Competitor, Average	Competitor, Average
Behavioral	Lots of hovers over various items.	Hovered on email signature settings. "Hmm"	"What the hell are joyful animations?"	"Hmm" on attachments	Hovered on contacts.
Help Utilized	N	N	N	N	N
Subjective: Difficulty setting up account from 1-7, 1=hard, 7=easy.	5	4	6	5	4
Subjective: Thoughts on setting up account	"Setting up the account was pretty painless"	"It's different from what I'm used to"	"Mostly okay, there were some bugs. Also the 2 clicks to get to settings is really annoying"	"There's a lot of stuff to go through"	"It [sidebar] could use more relevant settings"
Subjective: Anything that wasn't able to be set up but wanted to?	"There was a feature that sounded neat but I couldn't find it again"	"I was trying to set up rules but I couldn't find it"	"Unsure since I usually iterate the setup process"	"No"	"The signature. It was not naturally in the flow"
Perception Probe: Did the layout help to set up account?	"No complaints. I would rearrange some of the items"	"The layout is clean"	"It neither helped nor hindered, but the sidebar is annoying"	"It is easy to navigate"	"I went to the wrong corner for the settings"

Knowledge Probe: What are focused emails?	Incorrect (unsure)	Incorrect (unsure)	Incorrect	Incorrect	Correct
Subjective: Visual appearance from 1-7, 1=not appealing, 7=appealing.	5	6	5	6	5
Subjective: Thoughts on visual appearance	"Looks decent"	N/A	"Not amazing but not bad"	"Well, I set it up this way…"	"Some people might miss that you can drag the bars"

Performance Findings: None of the participants (0/5) utilized Outlook.com help while setting up their account. Only 1/5 participants answered the knowledge probe about focused email correctly.

Errors Observed: An error on the Microsoft side, many participants (4/5) were asked to input a phone number to access their account. 3/4 of these participants thought that they were required to put in a phone number to access their account once more, and 3/4 participants incorrectly put the generated code in the box when it was asking for their phone number again.

Subjective Findings: 4/5 participants gave the account setup process a moderately easy rating, while one participant (P4) gave it a very easy rating. 3/5 participants were unable to find something they were looking for while setting up their account. Most of the participants responded positively to the question if they felt the layout of Outlook.com helped them set up their account, but most (3/5) also made comments on items that they thought could be improved.

Behavioral Findings: All participants (5/5) displayed some sort of confusion during the account set-up process. 3/6 participants had at least a few moments of extended hovering, while 3/6 participants either gave a "hmm" or an interjection.

Analysis & Conclusions: The overall consensus per the rating scale was that the account setup was fairly easy to do. However, our behavioral data indicates that all of the participants (5/5) experienced some level confusion, and participants themselves (3/5) admitted that there was something they wanted to set up but were unable to find. This seems to indicate that the visibility/discoverability concerns we had are valid.

Similarly, while participants seemed to think the overall layout was fine, 3/5 made a comment about something they would like changed. Of particular note there is the sidebar settings, which participants largely did not like: the multiple clicks to get to the useful settings and the options that appeared in the sidebar settings. Interestingly enough, participants gave mostly positive remarks about the visual appearance and did not bring up or expand on their previous remarks about the layout.

Finally, only 1/5 participants answered the knowledge probe correctly which shows the "Focused Email" verbiage is not satisfactory. All of this indicates that there is room for improvement in the layout and process of setting up email accounts.
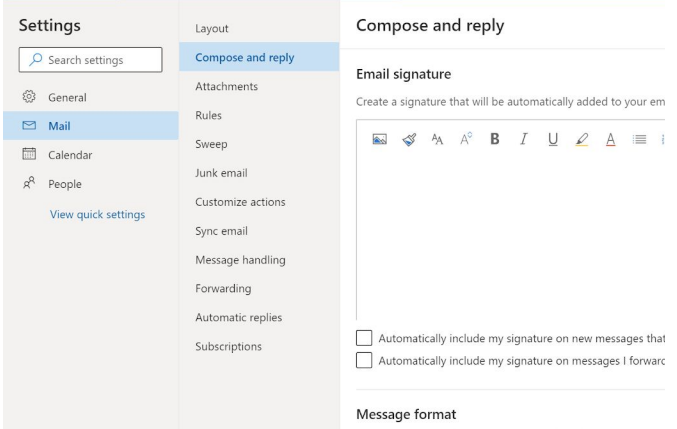
See our **Recommendations** section for guidance on how to improve the Outlook.com settings.

Account Setup | **Grade: C+**

Many of our participants had problems not being able to set up something that they wanted to, which is indicative of poor visibility for the most common user goals. Additionally, Outlook.com has a "quick start" setup that does not contain very helpful tasks for a new user to complete; we think that it is admirable to have that feature but it is incredibly lacking in its current form. Finally, the sidebar setting pane was largely found useless by our participants and only served to annoy them that they had to perform two clicks to reach the "advanced" settings menu. We think that the ideas are there but the execution was poorly done.

Add a Signature

Adding a signature is a common task that many email users end up doing. We were concerned that it is lacking visibility and discoverability in Outlook.com and wanted to learn if users were able to find it or if they would get frustrated.

Image	Issue Description
	The path to reach the signature options required 4 clicks. This lacks **visibility** and **discoverability**; we were unsure if participants would be able to find it without utilizing search.

What this could mean: If users cannot find the signature option, they may think that Outlook.com does not have that feature or will get frustrated because they believe it should be an option somewhere, which could lead to them not wanting to use Outlook.com as their primary email provider.

Task 4 (All Users) - Set up an Email Signature
All users were asked to set up an email signature.

Metric	P1	P2	P3	P4	P5	P6
Participant Type	Competitor, Average	Outlook, Power,	Competitor, Average	Competitor, Power	Competitor, Average	Competitor, Average
Behavioral	N/A	N/A	"Hmm"	N/A	N/A	Hovered over a few settings
Help Utilized	N	N	N	N	N	N
Successful Completion	Y	Y	Y	Y	Y	Y
Subjective: Difficulty setting signature from 1-7, 1=hard, 7=easy.	7	6	4	7	7	5
Subjective: Thoughts setting up signature	"I saw the settings earlier so I knew where to go"	"It's different on enterprise but I found it easy enough"	"It took me a while because it's different in the desktop version"	"It was easy to find"	"It was easy"	"I'd like an option to set for a new mail vs a reply mail"

Performance Findings: 6/6 participants were able to successfully complete the task and acknowledge that they successfully completed it without hesitation.

Subjective Findings: The majority of participants gave the email signature task a very easy rating (4/6) while two participants (2/6) gave it a moderately easy rating. While 2/6 participants said that it was very easy to set an email signature, 3/6 commented on differences between what they were used to or options they felt were lacking.

Behavioral Findings: The majority of participants (4/6) did not exhibit any difficulty in setting up an email signature but 2/6 participants did display minor confusion with the process.

Analysis & Conclusions: All participants (6/6) were able to complete the email signature task without having to refer to the built-in help. There was only a little bit of confusion exhibited by participants (2/6) and all participants (6/6) rated the task as either moderately easy or very easy to do. While the overall response to the task was largely positive, we think there is still some room for improvement; as one participant (P6) stated: it would be handy if the signature was included in the "getting started" items when one first logs into their account.
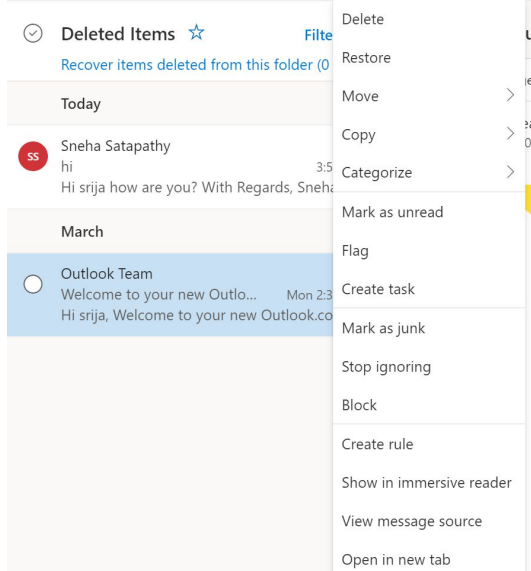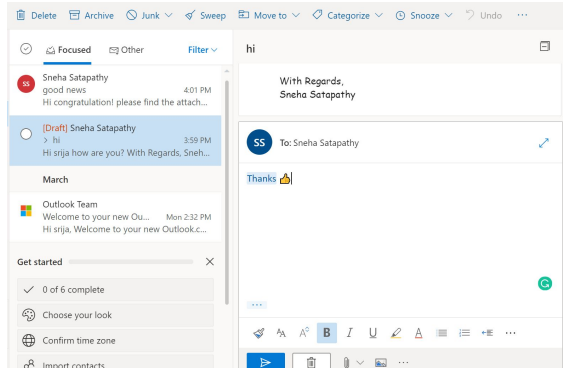
See our **Recommendations** section for guidance on how to improve the Outlook.com email signature process.

Email Signature | **Grade: B+**

Once participants could find the location to change their email signature, they did so quickly and efficiently. The only criticism we had is that it should be easier to find this setting.

Email Manipulation

Sending and receiving email is really the heart of email applications. If users struggled to send an email, that's a very bad sign. We didn't foresee any major issues with sending an email but thought users could potentially struggle with recovering deleted emails. We also wondered if the rich text formatting was consistent with what users expected.

Image	Issue Description
	There are a few ways to recover an email, but we thought the word "restore" might potentially confuse participants. This might be a problem with **consistency and standards.**
	While we expect most users to use the rich text formatting without second thought, we weren't as sure if the emoji box lacked **visibility**, or if users would notice and try to use the format painter.

	Sending an email does not produce any sort of response from the email application, meaning it lacks **feedback**. We expect users to be unsure if the emails were sent properly.
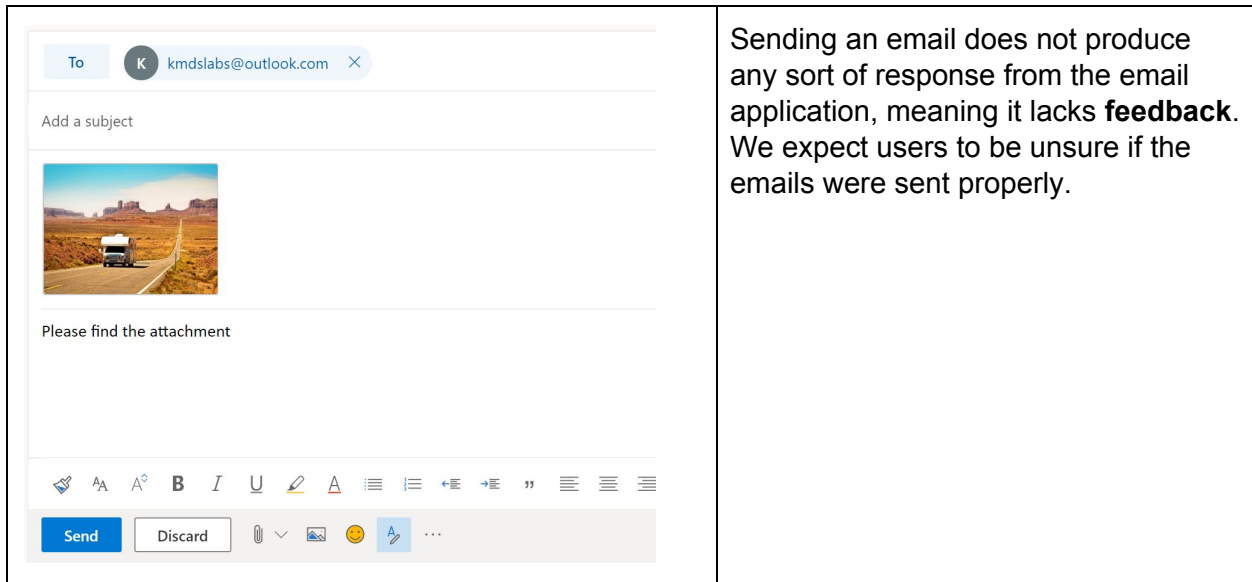
What this could mean: If users accidentally delete an email, they will likely be stressed out when they go to recover it. The interface should be as intuitive as possible so users in that frame of mind won't have a bad experience.

Task 5a (Average Users) - Send an Email
Average users were asked to send an email to KMDSLabs@outlook.com

metric	P1	P3	P5	P6
Participant Type	Competitor, Average	Competitor, Average	Competitor, Average	Competitor, Average
Time on Task	50s	46s	48s	22s
Behavioral	Disbelief and laughter when the captcha popped up	Hovered over captcha for a few seconds	"Why do i need to do this?"	N/A
Successful	Y	Y	Y	Y
Subjective: How do you know you were	Looked at sent mail	Looked at sent mail	Looked at sent mail	Looked at sent mail

successful?				

Task 5a (Power Users) - Send an Email with Rich Text Formatting
Power users were asked to send an email with rich text formatting to KMDSLabs@outlook.com

metric	P2	P4
Participant Type	Outlook.com, Power	Competitor, Power
Time on Task	N/A	1:23
Behavioral	N/A	N/A
Successful	Y	Y
Subjective: How do you know you were successful?	N/A	Looked at sent mail
Knowledge Probe: Do you know what Format Painter does?	N/A	No
Subjective: How would you expect it to work?	N/A	"I expect you could select text and the button would take the styling and apply it to another section."

Task 5b (Average Users) - Restore an Email
Average users were asked to delete two emails and then recover them.

metric	P1	P3	P5	P6
Participant Type	Competitor, Average	Competitor, Average	Competitor, Average	Competitor, Average
Behavioral	N/A	Hovered on contextual menu for a while	N/A	N/A
Successful	Y	Y	Y	Y
Subjective: Comments	"I don't know how to	N/A	N/A	N/A

during task	undelete...oh, probably this button up here"			
Subjective: How do you know you were successful in recovering the email?	"Uh it looks like it"	Navigated to inbox to see emails	Navigated to inbox to see emails	"I think I got them all"
Knowledge Probe: Did you know you could select multiple emails at once?	Y	Y	Y	Y
Knowledge Probe: Will emails in the deleted items folder be automatically deleted?	Incorrect - "Yes, after a while"	Correct - "No, not unless you empty it"	Correct - "No, they don't get automatically deleted unless you set it up like that"	Incorrect (Unsure) - "I think there's a setting that you can choose to have it automatically delete. Not sure if it is already on or not"

Task 5c (Average Users) - Reply to an Email using Rich Text Formatting

Average users were asked to find a specific email and reply to it with rich text formatting—namely, bolded text and a thumbs up emoji.

metric	P1	P3	P5	P6
Participant Type	Competitor, Average	Competitor, Average	Competitor, Average	Competitor, Average
Time on Task	41s	35s	20s	46s
Behavioral	N/A	"Hmm"	N/A	N/A
Path: Used search?	Y	Y	N	Y
Successful	Y	Y	Y	Y

Performance Findings: The average users took a similar amount of time to write and send an email for task 5a at around 50 seconds. P6 was an outlier since he sent an email as part of the account setup task so we did not have him send an additional email; thus he did not have to verify the email address that he sent the email to or type a specific message like the other participants. All participants(6/6), both power and average, were successful in writing and sending an email. All participants (6/6) were successful at restoring email.

The time on task for average users to find and reply to an email with rich text formatting varied from 20 seconds to 46 seconds. Some users had a more difficult time finding the specified email than others; even though participants used proper search terms, the email did not always appear after a search. The power users were able to reply to an email with rich text formatting but only one participant (P4) was able to complete this task; there were technical issues with P2.

4/4 average user participants knew how to select multiple emails but only 1/4 answered correctly when given a knowledge probe about whether or not the deleted emails folder would automatically delete emails.

Subjective Findings: Of average users, 4/4 had to look at the sent mail folder to ensure that their email was sent. The one power user who completed the task also had to look at the sent folder to ensure the email was sent.

Participants were also unsure about recovering deleted emails; 4/4 average users sounded uncertain when responding to the question "how do you know you were successful in recovering the emails?"

Behavioral Findings: Most users who encountered a captcha (3/4) were confused by its appearance; one laughed in disbelief, another uttered "why do I need this?" and the third hovered a while over the captcha before completing it. Otherwise, the tasks did not elicit much of a behavioral response.

Analysis & Conclusions: While participants didn't have any issues sending mail, they weren't quite sure if it was sent because there wasn't any sort of confirmation that assured them that the action had been completed; adding some kind of feedback mechanism would immediately fix that. They also were unsure if the emails they recovered from the deleted items folder were actually restored since there wasn't any confirmation message or indication that they had been moved; again, some feedback would remedy this. Lastly, participants were miffed by the captcha that randomly appeared before they were allowed to send email.
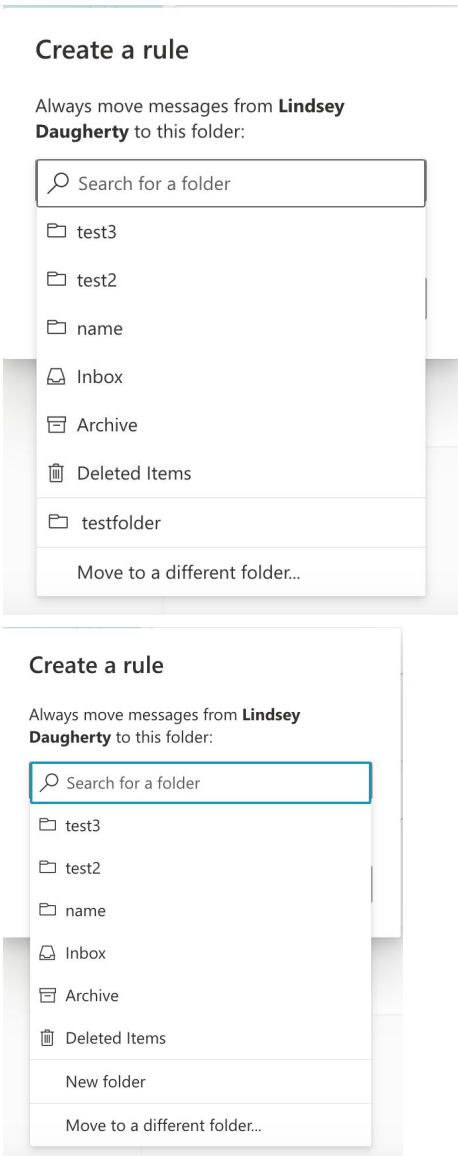
See our **Recommendations** section for guidance on how to improve mail tasks.

Email Manipulation | **Grade: C**

While all participants were able to send email in a timely manner, the fact that all participants were uncertain if their email was sent and had to check the "Sent mail" is not acceptable. There needs to be a feedback mechanism for sent mail and recovered mail so users are certain their actions were completed. Additionally, the captcha that randomly appeared when participants were attempting to send email looked juvenile and out of place with the rest of the Outlook site.

Organizing Email

Filing, sorting, and creating rules are all ways to organize email. We wanted to know how quickly users could figure out that folders were a primary way to organize the Outlook.com inbox, and thus, if sorting into folders was an intuitive action that users expect.

Image	Issue Description
	While the folder sidebar is pretty obvious, users who might try to create a folder from a rule can run into issues since it can be hard to tell if your folder was created or not—to have it appear you need to click "Move to a different folder" which has low **visibility**.

What this could mean: Users typically want to sort their email by folders, so it is of the utmost importance that this functionality works properly or else users will become frustrated. Power users will want an easy way to create rules or higher level organization, so these options should be easy to find and use.

Task 6 (Average Users) - Find and File an Email

Average users were asked to find an email containing flight information and to file it with similar emails.

metric	P1	P3	P5	P6
Participant Type	Competitor, Average	Competitor, Average	Competitor, Average	Competitor, Average
Time on Task	32s	2:49	1:57	1:33
Behavioral	N/A	"Umm"	Sighed, low utterances, "where was that?"	Sighed
Path: Used search?	Y	Y	N	N
Path: Method	Categorize	Rules	Move	Rules
Successful	Y	N	Y	Y
Subjective: How do you know you completed the task successfully?	"I made a tag that you can see in the inbox"	"I don't know why it's not moving the email"	"It's in the folder"	"I see it in the folder"
Subjective: Did you struggle with anything?	"No, it was easy to do"	"No, but the rule didn't activate"	"Would have been easier if there was something to click on to create	"I didn't see an option to edit the rule"

			a rule"	

Task 6 (Power Users) - Organize Email

Power users were asked to walk through their process of organizing their email account as if they were expecting to receive a large number of emails from various entities related to their company (e.g. manufacturers, contractors, subcontractors, meeting invites, etc).

metric	P2	P4
Participant Type	Competitor, Power	Competitor, Power
Subjective: How would you organize the email?	"I would create folders by type of sender then save in one folder by descriptive type. "	"I would set up a bunch of folders for common things, since inboxes are black holes. I'd especially get low priority things out of the inbox and filter out spam."
Knowledge Probe: Can you explain what Archive does?	Y	Y
Knowledge Probe: What is the difference between the Junk folder and Deleted Items?	Correct	Correct

Task 8 (Power Users) - Automatic Email Sorting With Rules

Power users were asked to sort a business tips newsletter so their inbox would not become cluttered using rules.

metric	P2	P4
Participant Type	Competitor, Power	Competitor, Power
Time on Task	1:18	1:17
Behavioral	"Uh.." "well" "wait a minute"	N/A
Successful	Y	Y
Subjective: Difficulty setting email rules from 1-7, 1=hard,	7	5

7=easy.		
Knowledge Probe: What does sweep do?	Unsure	Unsure

Performance Findings: 3/4 average user participants were able to successfully find and file an email. P3 had an issue setting up a rule and had the email move to a folder; our moderator decided to move on after she tried three times and was unsuccessful. The time on task varied significantly depending on what method participants used to file the email; those using rules took around the same time while the participant who used categories (P1) completed the task much faster.

The power users answered both knowledge probes about archiving and deleting mail correctly but neither (2/2) could answer what "sweep" does. The time it took for each participant to complete the automatic sorting of email was almost the same exact time (1:17 vs 1:18).

Subjective Findings: While 3/4 average user participants completed the find and file task, 3/4 also had a suggestion for improving the rules process.

Both power users (2/2) gave a similar answer as to how they would organize their email. When it came time to sort their email with rules, one rated the task as very easy (P2) while the other rated it as moderately easy (P4).

Behavioral Findings: 3/4 average user participants exhibited some sort of frustration while attempting to sort their email, with 2/2 of those using rules to sort their email. 1/2 power user participants (P2) displayed confusion while setting up a rule. Overall, 3/4 participants who used rules were frustrated.

Analysis & Conclusions: Based on all of the data captured, both power user and average user participants (4/6) experienced some frustration or confusion when setting up rules to sort their email. This indicates that the rules workflow could be a lot better. As expected, 2 users (P2 and P3) had issues with rules not immediately being enacted; an "activate rules now"

button would remedy this. While the power user (P2) was able to overcome this issue, the average user (P3) was not.
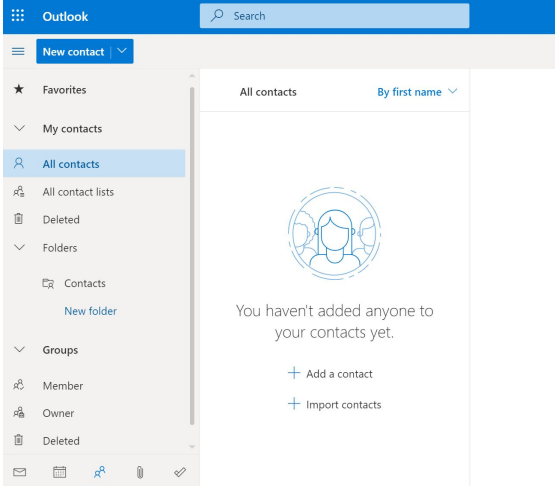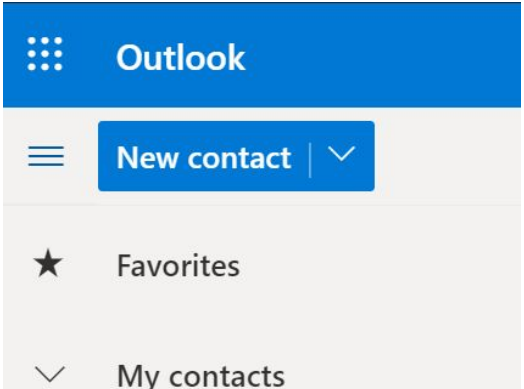
See our **Recommendations** section for guidance on how to improve mail tasks.

Organizing Email | **Grade: C**

Because the majority of users had issues—and subsequent frustration or confusion—setting up rules to organize their email, this task had to be marked low. Even though rules might be seen as more of a power user's forte, they are ubiquitous in Outlook.com. Since they are given such high visibility, they should be more user friendly. There is also some indication of inconsistent behavior and/or bugs in Outlook.com as some participants had the option to run a rule upon creation while others did not receive that option.

Contacts

Adding a contact is a very common task and we were concerned that it lacked visibility and discoverability in Outlook.com, especially as it is categorised under "People". Were users able to find it easily or did they get frustrated?

Image	Issue Description
	Users navigated to the contacts section of the website by clicking the bottom "People" icon. There were also a few other methods like clicking on a contextual menu inside an individual email. Neither method had very high **discoverability**.
	Like many other areas of the website, we were concerned that the "New contact" button was lacking **visibility**, particularly since it uses the same color as the bar immediately above it.

What this could mean: Adding contacts improves productivity and is something that most email users will expect to be integrated seamlessly into their email application. Failure to do this will result in frustrated users.

Task 7 (Average and Power Users) - Add a Contact
Both power and average users were asked to find a way to store a business card they received in an email.

metric	P1	P2	P3	P4	P5	P6
Participant Type	Competitor, Average	Outlook, Power	Competitor, Average	Competitor, Power	Competitor, Average	Competitor, Average
Behavioral	N/A	N/A	N/A	N/A	N/A	Hovered over the contextual menu
Path: Method	OneDrive	Contacts	Created a business card folder	Contacts	OneDrive	OneDrive
Successful	Y	Y	Y	Y	Y	Y
Subjective: Difficulty saving info from 1-7, 1=hard, 7=easy.	7	6	7	5	7	6
Subjective: Comments about the task	"That's a 7 right there assuming I did it right"	"It's cumbersome to copy and paste things"	"It was very easy"	"With images it's [adding contacts] not very helpful"	N/A	"I think the process was easy. I thought it might give me an option to create a separate folder in OneDrive."

Performance Findings: Both groups of participants (6/6) successfully completed the "add a contact" task. 3/4 average user participants saved the business card to OneDrive, the remaining average user participant (P3) created a folder and moved the email into it. Both power users (2/2) used contacts to save the information.

Subjective Findings: All participants (6/6) gave the task an "easy" rating, with 5/6 participants giving it a "very easy" score of 6 or 7. Despite this, 3/6 participants—both power users and one average user (P6)—made a comment about something they didn't like with the process without being prompted.

Behavioral Findings: Only one participant (P6) displayed any sort of confusion during this task; he hovered for a while on the contextual menu. We found this was because he thought there should be a way to create a separate folder in OneDrive.

Analysis & Conclusions: Outlook.com provides a number of different ways for users to store information, as demonstrated by this task. Participants overall seemed pleased with their chosen method, although a few lamented changes that they wish would be made: P2 hoped for an easier way to create a contact that wouldn't require so much copying and pasting of text; P4 thought that the system should include a OCR (optical character recognition) so that users could add text from images more efficiently, and P6 wanted more integration with OneDrive so that he could create folders from his email account and store items there accordingly.
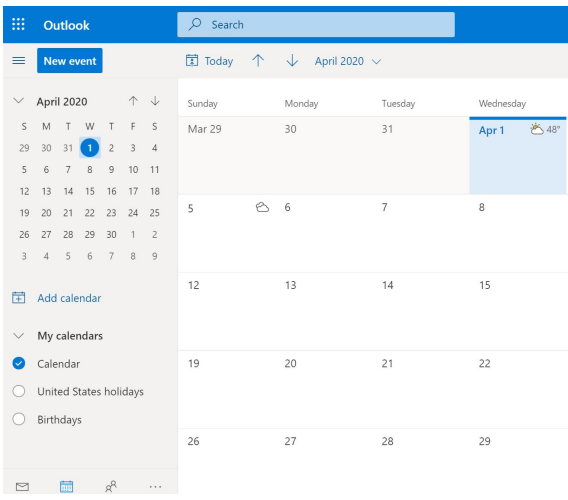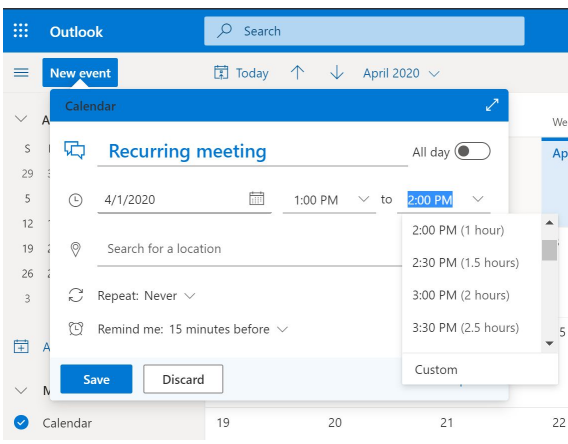
See our **Recommendations** section for guidance on how to improve Contacts.

Contacts / Storing Information | **Grade: A-**

This task was widely considered easy and participants exhibited very little in the way of struggling. The slight mark down is because there are a few minor quality-of-life issues that could be remedied.

Calendar

While calendars were not always core features in email applications, these days many people rely on them to schedule meetings and keep track of their own schedules. Most applications even integrate package delivery emails or flight information into your personal calendar!

Image	Issue Description
	The "New event" button lacked high **visibility** as it blended into the bar above it.
	Once a user goes to create an event, they would realize that it is easy to create an event for just one day, but setting it up for multiple days is a much bigger challenge. The user is required to click "Custom" to set it for multiple days, which is not intuitive. Overall the process to set a multiple day event is lacking **discoverability** and **visibility**.

What this could mean: Users could easily become frustrated with settings that are hidden or confusing.

Task 8 (Average Users) - Add Trip to Calendar
Average users were asked to add a trip to their calendar for the dates June 10-20.

metric	P1	P3	P5	P6
Participant Type	Competitor, Average	Competitor, Average	Competitor, Average	Competitor, Average
Time on Task	N/A	58s	2:55	1:52
Behavioral	N/A	N/A	"what"	Hovered on options
Errors	N/A	N/A	Initially tried to make a new calendar instead of a new event. Ended up marking 2 separate dates.	N/A
Successful	N/A	Y	N	Y
Subjective: Did you struggle with anything?	N/A	"nope"	"No, the more I play around with it the easier it would be"	"Yes, when I started putting the start time was fine but it was hard to find the end date"
Subjective: Difficulty marking calendar from 1-7, 1=hard, 7=easy.	N/A	7	6	4
Subjective: Would you change anything about the calendar process?	N/A	"It would be nice if it could be automatically color coded, like if it was a personal trip vs a work trip"	"Well, I didn't see this here" (indicates the New event button)	"I would want there to be an option to create a multi-day event"

Task 10 (Power Users) - Recurring Meeting Invite

Power users were asked to create a recurring meeting in their calendar for every Wednesday.

metric	P2	P4
Participant Type	Outlook, Power	Competitor, Power
Time on Task	1:42	51s
Behavioral	N/A	N/A
Successful	Y	Y
Subjective: Did you struggle with anything?	N	N
Subjective: Difficulty marking calendar from 1-7, 1=hard, 7=easy.	7	6
Subjective: Would you change anything about the calendar process?	"It would be nice if there were alerts that a meeting landed on a holiday"	"I would add an area for descriptions, and change the way locations are handled"

Performance Findings: Of the average users, 1/3 did not complete the task properly (P5). The time on task was longer than expected, ranging from 58 seconds to 2 minutes 55 seconds. The power users also varied a bit in time spent, with P2 spending 1 minute 42 seconds and P4 spending 51 seconds. Both power users (2/2) completed the task properly.

Errors: One average user, P5, initially tried to create a new calendar instead of a new event. We later discovered that they did not see the "New event" button.

Subjective Findings: 1/3 average user participants admitted to struggling with the calendar event task, but given the results, 2/3 actually had difficulty with the task. The participant that completed the task the fastest, P3, rated the task as very easy and said that the only change she would like to see, would be a way to have various trip types automatically color coded. The participant that failed the task, P5, also rated the task as being very easy, and indicated that he would like the"New event" button to have more visibility. The participant that admitted they struggled with task (P6) gave it a more neutral score of 4, and said it would be helpful if there were a quick way to create multi-day events.

Even though both power users (2/2) gave a very easy rating to the meeting task, both had commentary for how the meeting process could be improved.

Behavioral Findings: 2/4 average user participants exhibited confusion during the calendar task; P5 uttered a "what" while attempting to create a new event, while P6 spent a lot of time hovering over options as he tried to find where to add an end date.

Neither power user displayed confusion or frustration during the task.

Analysis & Conclusions: 4/5 participants of all types were able to successfully complete the calendar task. While the time on task varied, all participants (5/5) immediately navigated to the calendar; 2/3 average users struggled adding the event, particularly with adding ending dates to their event.

Participants recommended that it should be easier to create multi-day events, that descriptions should be included in the add event screen, and that the calendar should be "smarter" and be able to distinguish between types of events and be able to inform the user when events landed on holidays.
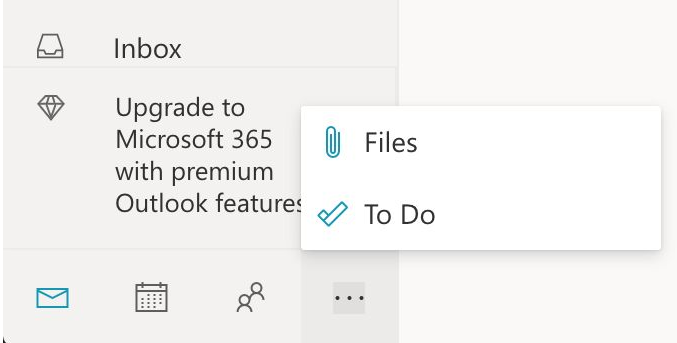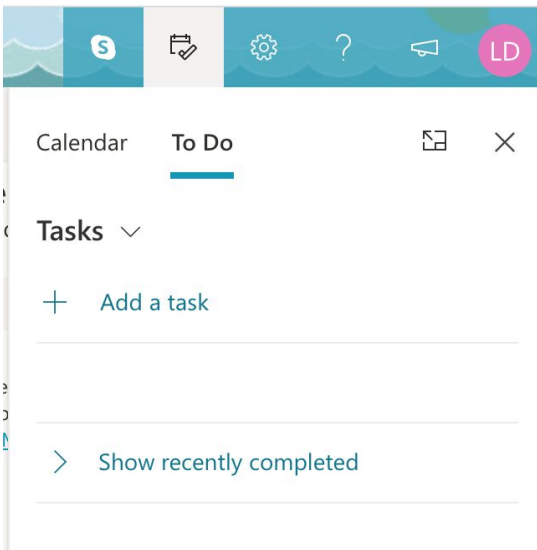
See our **Recommendations** section for guidance on how to improve Calendar interactions.

Calendar | **Grade: B**

All participants knew where to navigate for a calendar task; however, many participants struggled with creating a multi-day event. There is also low visibility on the "new event" button that should be remedied.

To Do List

To do lists, pretty much synonymous with tasks, allowed users to create items that they can then track and use to organize their day.

Image	Issue Description
	The "To Do" list option was lacking **visibility** since it is hidden under the three dots menu. Users may not notice it there.
	If users clicked the menu in the upper right of the browser, they would realize that they cannot name the task list or group the task list. They can only assign individual tasks there. This is a potential violation of **consistency and standards**.

What this could mean: Users may not find the To Do lists and end up completing tasks/actions in ways that are less efficient.

Task 9 (Average Users) - Create a Shopping List

Average users were asked to create a shopping list with 3 items related to their trip: sunblock, shoes, and a hat.

metric	P1	P3	P5	P6
Participant Type	Competitor, Average	Competitor, Average	Competitor, Average	Competitor, Average
Behavioral	N/A	"Umm" - was unhappy that the quick mode "to do list" didn't allow a task title and group, only individual tasks	Low utterances, he wanted to create a group shopping list, not just tasks.	Hovers; "ah!"
Verbal Comments	N/A	N/A	"I don't like this at all!"	N/A
Path: Method	To do list	To do list	To do list	Notes
Successful	Y	Y	Y	Y
Perception: Were you aware you could also create a to do list?	N/A	N/A	N/A	"No"
Perception: What could have helped you realize you could create a to do list?	N/A	N/A	N/A	"This should have been more visible"
Perception: Were you aware you could also create notes?	"I was not"	"No, I didn't know that"	"I was not aware. I was looking for something similar"	N/A
Perception: What could have helped you realize you could	"Maybe if there was a button down here" (indicated the	"Maybe if there was an icon more easily accessible to the	"I was expecting to find it up here" (indicates top menu)	N/A

create notes?	bottom icon menu)	user"		

Task 11 (Power Users) - Create an Agenda

Power users were asked to create an agenda with three items for their business: prototype, code, phone call.

metric	P2	P4
Participant Type	Outlook, Power	Competitor, Power
Behavioral	N/A	N/A
Successful	Y	Y
Verbal Comments	"For this I'd lean towards a to do list, but if there were other people involved I would create a meeting invite"	"I don't like that this page doesn't have my theme" (on the tasks page)
Perception: Were you aware you could also create a to do list?	N/A	N/A
Perception: What could have helped you realize you could create a to do list?	N/A	N/A
Perception: Were you aware you could also create notes?	Y	N
Perception: What could have helped you realize you could create notes?	"An icon at the bottom would help"	"I didn't notice it there. I wouldn't use it anyway because I don't see a use case for it"

Performance Findings: All average user participants (4/4) were successful in creating a shopping list. 3/4 opted to make a To Do list, while one (P6) chose to make a note. Both power user participants (2/2) successfully completed the task using a To Do list.

Subjective Findings: We found that participants stuck with a method they were most familiar with when completing this task: 3/4 average user participants were aware of the task paradigm and created their list accordingly; the final participant (P6) was aware of Notes and used them instead to complete the task. The other 3 users did not know Notes existed. All average user participants indicated that they would have liked more visibility for the feature they were not aware of.

Both power users (2/2) immediately created a task list, even though 1/2 participants knew about Notes as an option. Both commented that visibility was lacking for Notes.

Behavioral Findings: Of the average users who made a to do list, 2/3 experienced frustration since they were unable to create a group of tasks (or tasks with a header item); this was exhibited by the utterances they made. For one user, P5, the utterances turned into comments as he told us "I don't like this at all."

Neither power user (2/2) displayed any frustration or confusion during this task.

Analysis & Conclusions: Participants showed their bias when completing this task, as all average user participants (4/4) seemed to pick the method they were most familiar with, while power user participants (2/2) chose the method that they thought was most appropriate for the given task. Notes did not have bearing on what power users chose; both remarked they would be unlikely to use the feature. Average users expressed more interest; 3/4 were not aware of Notes and seemed to indicate if they had known about it, they might have used that method instead of creating a task list.

2/3 average user participants exhibited frustration creating a To Do list, as they were unable to quickly or easily create a group of tasks, or a list header.
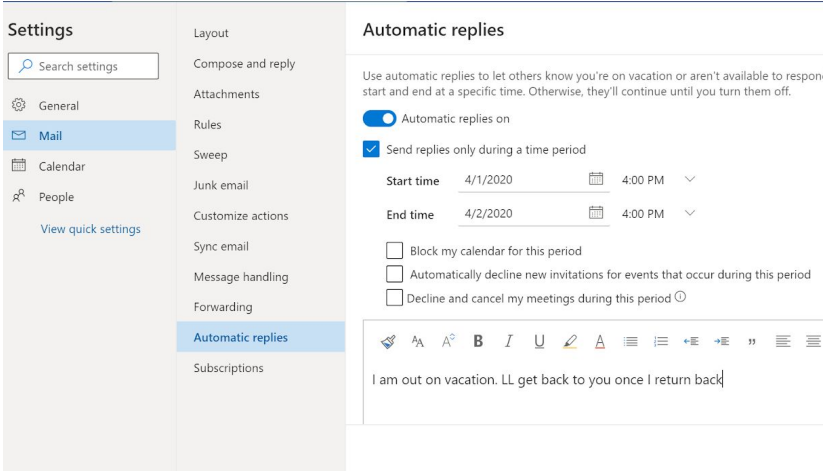
See our **Recommendations** section for guidance on how to improve the to do list and notes areas of the website.

To Do List or Notes | **Grade: B+**

Participants who were aware of either the to do list or notes were able to successfully complete the task. However, participants who attempted to create a to do list via the mail interface (as opposed to navigating to the main tasks page) found they were unable to create a header for their list like they expected. While this isn't a pressing issue, it is a minor cause of frustration.

Away Message

The away message, known in Outlook.com as "Automatic replies" are important to anyone using their email for heavy correspondence. Setting up an automatic reply can inform people that you are unable to respond, whether due to vacation, illness, or other; this allows the email user some peace of mind that people will not be offended with a delayed response.

Image	Issue Description
	Setting an away message takes 4 clicks to get to and the "Automatic replies" name might not be clear to users who are expecting something more like "Out of office replies" or an "Away message." We are concerned that it is lacking **visibility** and **discoverability**.

What this could mean: Anyone who uses their email on a daily basis is sure to have at least encountered someone's automatic reply, even if they have not set one up themself. Making this feature difficult to find can frustrate users.

Task 10 (Average Users) & Task 9 (Power Users) - Add an Away Message

Both power and average users were asked to add an automatic away message for the duration of their trip.

metric	P1	P2	P3	P4	P5	P6
Participant Type	Competitor, Average	Outlook, Power	Competitor, Average	Competitor, Power	Competitor, Average	Competitor, Average
Time on Task (time to reach setting)	11s	15s	59s	12s	52s	9s
Behavioral	N/A	N/A	Hovers over incorrect items	N/A	Sighed	N/A
Successful	Y	Y	Y	Y	Y	Y
Outlook Error	Y	Y	Y	N	Y	Y
Subjective: Difficulty setting away message from 1-7, 1=hard, 7=easy.	7	7	7	7	7	6
Subjective: Verbal comments about the task	N/A	"Nope"	"It's right under settings"	"It makes a lot of sense"	"It was easy"	"I think if I could click on my account and select it from there it would be easier"
Subjective: Did you struggle with anything?	"No"	"No"	"No"	"No"	"No"	"No, I think it was quite straightforward"

Performance Findings: Outlook unfortunately threw an "unable to load settings" for 5/6 of our participants, which complicated this task. To accomodate this flaw, we marked users as having successfully completed this task once they navigated to the Away message settings. The majority of participants (4/6) were able to complete the task in 15 seconds or less. Both power user participants (2/2 and 2 of the average users (2/4) quickly completed the task. The remaining 2 average user participants both took around 50 seconds to complete the task and did so with some obvious difficulty.

Subjective Findings: Even though 2/6 participants experienced some kind of difficulty completing the task, all 6 participants rated the task as "very easy" and only 1/6 participants (P6) had any feedback regarding how the process could be improved.

Behavioral Findings: Both average user participants that demonstrated frustration or confusion (P3 and P5) also took longer to complete the task. None of the other participants displayed any frustration or confusion.

Analysis & Conclusions: Setting an away message was perceived as an easy task by all participants (6/6) even though two participants (P3 and P5) struggled with it, evident by both time on task and captured behavioral data. Not only were these two participants slower to complete the task, they also displayed confusion by sighing and exhibiting hovering behavior. The discrepancy between the data types shows the inherent bias these participants had regarding the ease of use of the tasks, and underscores the need to capture a variety of dimensions to ensure that the true picture—e.g., that not all participants found the task easy—comes out.

As one participant (P6) suggested, it would be nice if there was a shortcut method to set the Away message.
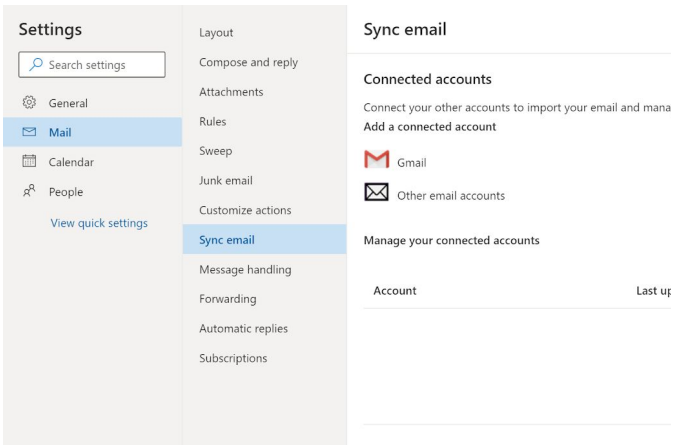
See our **Recommendations** section for guidance on how to improve away messages.

Away Message | **Grade: C-**

While all participants successfully navigated to the away message setting, Outlook.com threw errors for the majority of participants and they were unable to complete the task. This is another setting that could be given higher visibility and definitely needs to have bugs fixed.

Importing Email

Outlook.com provides a way for users with other email accounts to connect them to their Outlook.com account via the Sync email function. This allows users to import, read, and send their mail associated with that second account, all without having to leave Outlook.com. This allows users to, for instance, consolidate their Gmail and Yahoo accounts with their Outlook.com account as opposed to checking their email in multiple locations.

Image	Issue Description
	The setting is buried by three clicks and thus lacks **visibility**. On top of that, the header is called "Sync email" instead of "Connect accounts" or even "Connected accounts" which indicates a lack of **match between system and real world**. We are concerned that users may not even be able to locate this feature.

What this could mean: It is very likely that users will be unable to find the setting to import their mail from a different email account since the verbiage ("Sync") is not standard. Even if people do enjoy the Outlook.com interface, the inability to consolidate their email account could be a major deal breaker for people.

Task 12 (Power Users) - Add an Email Account

Power users were asked to link an additional email account using the given account information to their current email account.

metric	P2	P4
Participant Type	Outlook, Power	Competitor, Power
Time on Task	3:07	43s
Behavioral	"umm"	N/A
Path: Used search?	Y - had to prompt to search for "connected account"	N
Successful	N	Y
Subjective: How do you know you completed the task successfully?	N/A	"I can see emails that were sent to the other email address in the inbox"
Subjective: Difficulty adding an account from 1-7, 1=hard, 7=easy.	N/A	7
Subjective: Comments about task	"I don't know that I know how to add an account to the one I have now"	"Importing the account wasn't the problem, the presentation of accounts is not good"
Subjective: If you could change anything about the process, what would you change?	"I would not have figured out it was under Sync. I think it should be called 'Add an Account'"	"I would rather you had to change credentials like Google since there is less room for error"

Performance Findings: Only 1/2 participants were able to successfully add an email account. P2 tried to use Outlook.com's help but it proved to be unhelpful. While P4 had seen the "sync" option previously and knew exactly where to go, P2 was given a hint and still could not find the correct setting.

Subjective Findings: P4 gave the task a very easy rating since he knew exactly where to go. However, he was unhappy with the display of the imported emails since, as he put it, it was "prone to error" wherein the user could accidentally send an email using the wrong email

account. Meanwhile, P2 had a very difficult time with the verbiage and admitted that he would not have figured out it was located under "Sync."

Behavioral Findings: P2 displayed confusion numerous times during the task, which makes sense since he was unable to successfully complete the task.

Analysis & Conclusions: The results seem to indicate that users who know where to go will likely experience few problems while adding an email account. P4 pointed out that it was also easier than it might have been since manual settings were not required, like they are for custom domain email addresses. P2 was not happy with the name of the setting and would have preferred that it was called "Add Account" or something of that sort instead of "Sync".

See our **Recommendations** section for guidance on how to improve the importing email feature.

Importing Email | **Grade: C+**

Once users navigated to the correct setting, it should have been simple enough for them to set up the import of mail for a standard email account. However, calling this feature "Sync" does not match what users would typically expect. It is confounded by the fact that search terms are not generous and require users to know the correct associated words already.

Final Impressions

Task 12 (Average Users) & Task 14 (Power Users) - Wrap-Up
Both power and average users were asked some final questions on their thoughts and interactions with Outlook.com.

metric	P1	P2	P3	P4	P5	P6
Participant Type	Competitor, Average	Outlook, Power	Competitor, Average	Competitor, Power	Competitor, Average	Competitor, Average
Subjective: How easy or difficult was it for you to use Outlook.com?	"I had a little knowledge on what to do, it wasn't a great experience but not terrible either"	"Very easy. I appreciate that it looks and acts like the enterprise version"	"Pretty easy"	"There was a clean interface overall, but the settings clicking is silly"	"It was easy to use. I'd be willing to use it again"	"Quite straightforward. Easy to use"
Subjective: How visually appealing is Outlook.com from 1-7, 1=not at all, 7=very.	5	7	6	5	6	4
Subjective: Comments about visual appeal	"Looks pretty nice and clean. Not the greatest mail service"	"It's more visually appealing than the enterprise version"	"It looks appealing but I don't like the banner ads"	"I like that it has dark mode"	"It's clean and to the point"	"I think it still looks like a corporate application. It should be easier to change settings"
Subjective: How acceptable are the # of ads from 1-7, 1=not at all, 7=very.	N/A	7	6	N/A	1	3
Subjective: Comments	"I have ad blocker"	"It doesn't matter to	"The ads are	"I use ad blocker so I	"I don't like that ad on	"I get a lot of ads"

about ad acceptability		me"	distracting when they're moving"	can't see them"	the side"	
Subjective: What did you like about Outlook.com?	"I liked the To Do list. I also like the integration with OneDrive"	"I like that I can view it on my phone and that it's relatively intuitive"	"It's clean and easy to use, general setup is user friendly"	"I like that it mimics the desktop version of Outlook. But I just don't see the point of some things"	"I like that it's easy to navigate and multitask, and it's clean"	"The familiarity with the enterprise account. Same style as Windows interface"
Subjective: What did you dislike about Outlook.com?	"The badgering for info. The way it locked me out until I added my phone number felt coercive"	"I would like to save emails by dragging to the desktop"	"I don't like the ads, I want them to be smaller"	"I really don't like the multiple clicks for settings. Some integrations just don't seem necessary, like Skype. Overall with all the bugs it feels incomplete"	"I don't like clicking through the double settings windows"	"I felt like some options are missing. I would like more of the theme showing"
Subjective: Did Outlook.com act as expected or did it surprise you today?	"Expectations were met"	N/A	"The error messages were a surprise"	"It pretty much acted as I expected"	"It's a little easier than when used for work"	"Just the automatic reply bug"
Subjective: How does Outlook.com compare to your current primary email provider?	"Positively, maybe?"	N/A	"Outlook has helpful functionality"	"It's a bit sharper than Gmail. Someone thought about usability here, but Gmail only thought about features"	"I would much rather use MS Word etc than Google docs"	"I like that the interface is business like but it should allow users to change some more options"

Perception: Did you feel like Outlook.com had the same features as your current primary email provider?	"Same features, maybe more"	N/A	"Yes"	"Yes, everything is there."	"It has more features"	"The main activities are pretty similar. I did not try the search"
Subjective: Would you consider using Outlook.com instead of your primary email provider?	Y	N/A	N	N	Y	Y
Subjective: Elaboration on previous question.	"If I could migrate my Gmail to Outlook I'd be open to the idea"	N/A	"My personal account is tied to too many accounts"	"I've had my email forever so I'm not going to leave it"	"It has all the benefits Google has, so yeah"	"I am partial to it. Gmail is more cluttered"
Subjective: How interested are you in Premium from 1-7, 1=not at all, 7=very.	1	2	5	1	5	5
Subjective: Comments about Premium	"I don't need any of those features"	"I'm not at all interested in it"	N/A	"It's competing on platforms and history, not on features. I'm already established on Gmail"	"I might be interested. Depends on cost"	"The full desktop version of Office is good and the TB of space is good. It is probably expensive in India though"
Subjective:	"I don't like	"Nope"	"No"	"It's pretty	"No"	"More

Is there anything else you would like us to know?	how the panels act like windows but they're not"			sharp, I would have liked Hotmail with this interface"		flexibility in arranging the layout would be good"

Subjective Findings: All 6 participants found Outlook.com easy to use. The ratings for visual appearance were overall positive as well, with all of the scores being 4 or better. The word "clean" was used by multiple participants to describe the interface. Participants seemed torn on the ads: some (P2, P3) thought the current number of ads was fine, whereas others (P5, P6) thought that it was not fine. A few participants (P1, P4) used an ad blocker and could not see the ads.

Many participants (5/6) liked that Outlook.com had a similar look and feel to the enterprise version of Outlook—which almost all of our participants seemed to have some level of experience with.

Two participants (P4, P5) were very vocal about the settings sidebar being annoying and that they would prefer a one-click option to get to the advanced settings. P6 also felt that there should be more options available to change settings, and that some should be featured in that sidebar pane instead.

5/5 participants felt that Outlook.com had the same (or more features) as their current email provider. However, only 3/5 said that they would consider making the switch. Major reasons for declining switching were that they had their email account for a long time.

Participants were very split on the idea of Premium: 3/6 were pretty interested and 3/6 were not at all interested. Many of the disinterested participants said that there were no features that appealed to them.

Analysis & Conclusions: It seems like people came away with overall positive feelings about Outlook.com. 5/5 participants held the perception that Outlook.com was at least as

feature-rich as their current email provider, and 3/5 said that they would consider making the switch. A few participants (2/5) said they would not because they owned their email account for a long time.

See our **Recommendations** section for guidance on how to improve the overall Outlook.com experience.

Overall Outlook.com Look & Feel, Usability | **Grade: B**

The overall perception was that Outlook.com had a clean interface and contained as many features as other comparable email applications. While half of the participants did not seem inclined to switch to Outlook.com, this was more due to experience with previous applications, rather than a disinclination due to Outlook.com's look or featureset. Because of some interface errors encountered and some frustrating interactions, Outlook.com did not receive an "A" grade.

Recommendations

We have ranked the issues identified in the **Findings** section from low priority to critical priority depending on the severity of the offense. Low priority violations are those that don't have much of an impact on the user while critical priorities need to be addressed quickly or else frustrated users will abound.

Low Priority
Cosmetic or insignificant problem that the user may not even notice.

Medium Priority
A minor usability problem that may cause slight annoyance.
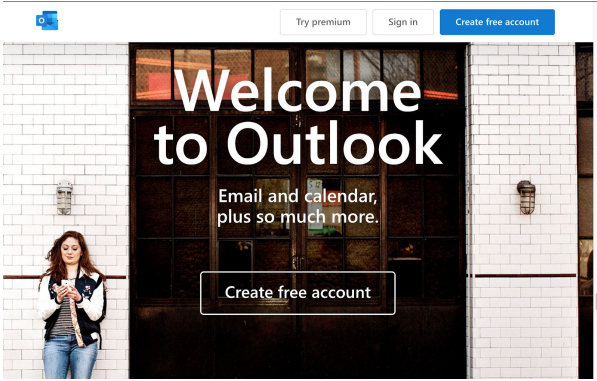
High Priority
A major usability problem that will likely cause user frustration.

Critical Priority
A major, critical problem. It is imperative that the problem is fixed to ensure good usability; user frustration is imminent.

Outlook.com Homepage

Landing Page Layout
Severity: Low
User Issues: 2/5 participants did not know the premium version existed. 3/5 participants were able to give 2 correct responses to the premium version's features but 2/5 could not say any premium features.

Principle Violated: Value Proposition	**Description:** The website is too long. Users will not retain relevant information.

Recommendation: Tighten up landing page so that it's shorter and more to the point. Users won't typically spend very long reading a marketing page like this, so the key features should have more salience.

Premium Information

Severity: Low

User Issues: 2/5 participants did not know the premium version existed. 3/5 participants were able to give 2 correct responses to the premium version's features but 2/5 could not say any premium features.

Principle Violated: Discoverability
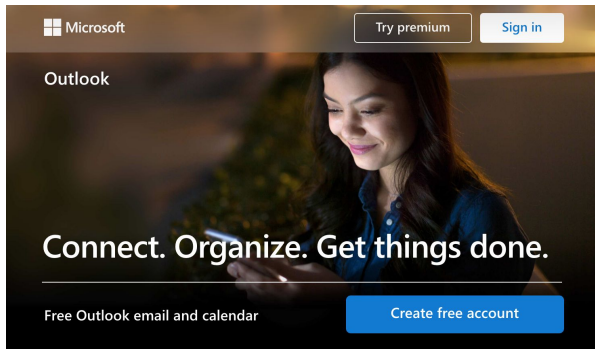
Description: Information about premium is located at the bottom of the website where users will not read it.

Recommendation: Either move Premium features up higher in the page or make the entire length of the website much shorter.

Premium Information

Severity: Low

User Issues: 2/5 participants did not know the premium version existed. 3/5 participants were able to give 2 correct responses to the premium version's features but 2/5 could not say any premium features.
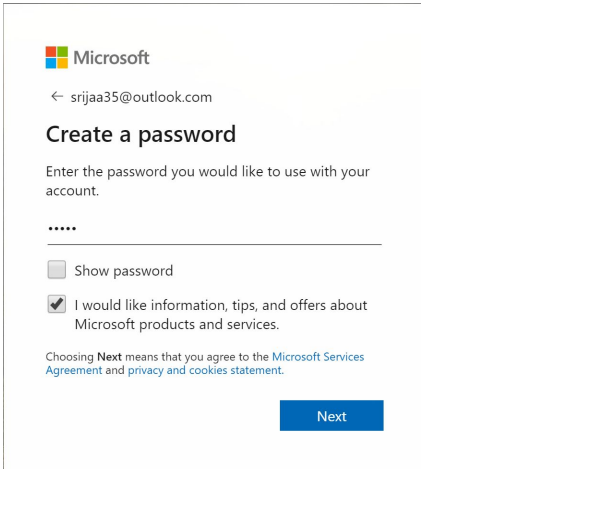
Principle Violated: Visibility

Description: Because the Premium text is a very similar color to those used in the background, it has low visibility.
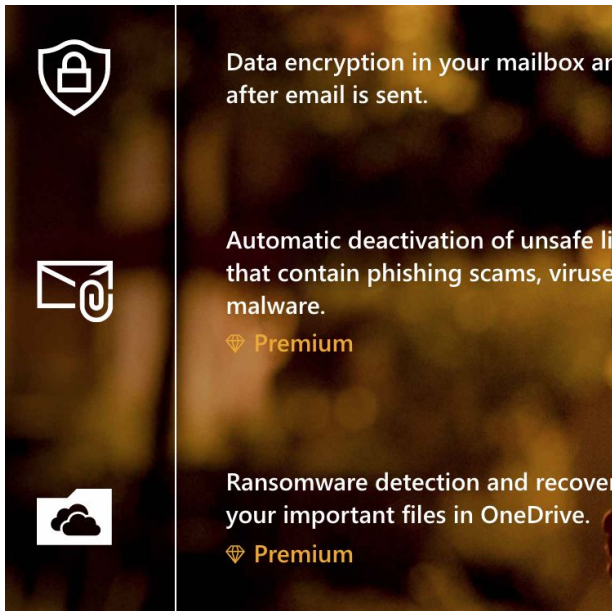
Recommendation: Make the colors for the Premium text brighter, and ideally call out the Premium features in a box elsewhere.

Register or Sign in

Password criteria
Severity: Medium
User Issues: 2/4 participants ran into issues registering for an account such that they had to re-input information.

Principle Violated: Cross-pollination	**Description:** Choosing an inappropriate password (e.g. something deemed "too common") will trigger an alert and prompt for a new password only after completing the next step in the registration process (adding a birthday). The user should not need to re-enter information.

Recommendation: Keep the user's input birthday/etc stored so the user doesn't need to re-enter information if there is an error.

Captcha	
Severity: Critical	
User Issues: 3/4 participants complained about the captcha, with one even going so far as to say "I hate the captcha!"	
Principle Violated: Readability **Microsoft** ← srijaa35@outlook.com **Create account** Before proceeding, we need to make sure a real person is creating this account. d6MWVX63WX [New] [Audio] Enter the characters you see d6MWVX63WX [Next]	**Description:** We found the captchas to be difficult to read and to be prone to error.
Recommendation: Make the captchas easier to read and complete. A visual puzzle or simple math problem could be a better option.	

Password Display
Severity: Medium
User Issues: While this was not one of our tasks, many users were forced to sign back in after encountering a security verification dialogue. 2/4 average participants struggled with inputting the password when it was not saved in their password keychain; the 2 average participants who chose to store the password via their browser did not experience issues.

Principle Violated: Transparency	**Description:** There is no way to see the password when signing in, although the option is given during the registration process.

Microsoft

← srijaa35@outlook.com

Enter password

••••••••|

☐ Keep me signed in

Forgot password?

Sign in

Recommendation: Allow users to view the password while they are typing it in. This option is available during password creation, so it should also be available during login.

Set up the Account

Quick Settings
Severity: Medium
User Issues: All participants (5/5) experienced some confusion during the account setup process. 3/5 participants commented that the sidebar was useless.

Principles Violated: Flexibility, Goal-Based Design 	**Description:** Users cannot modify these options, yet they overall found them useless.

Recommendation: Allow users to select the items to appear there themselves or determine the most popular/useful settings and place them there.

Advanced Settings
Severity: High
User Issues: 2/6 participants - one average and one power user - vehemently told us how much they disliked clicking twice to get to the advanced settings.

Principle Violated: Efficiency of Use	**Description:** Users really disliked having to click the settings twice to reach the advanced settings options. Having to do this impacts productivity for those users who would be performing such tasks like creating rules, setting away messages, or changing their email signature.
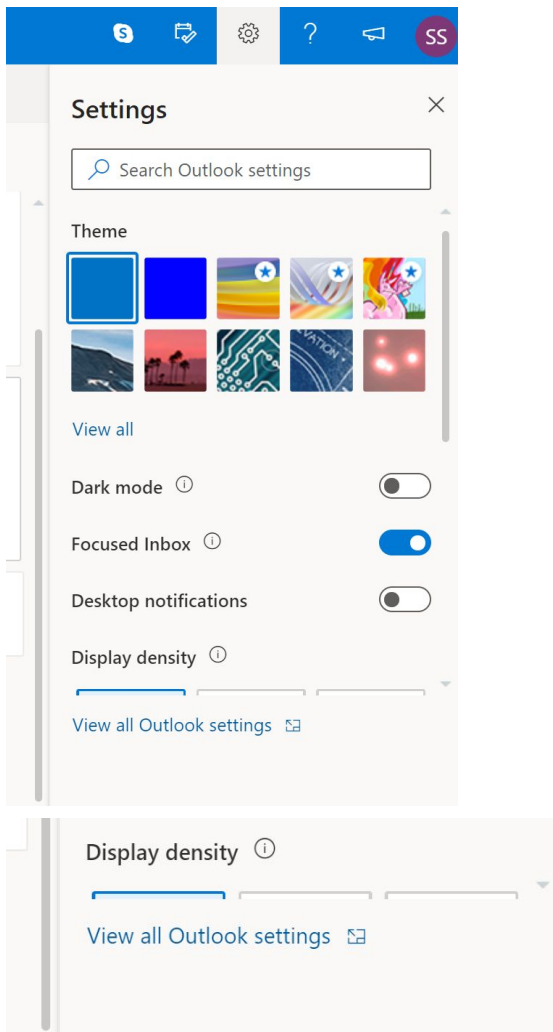
Recommendation: Keep the cog as the advanced settings button, but have a "quick start" or some such that opens the condensed settings pane.

Advanced Settings
Severity: High
User Issues: All participants (5/5) experienced some confusion during the account setup process. 3/5 participants were looking for something and could not find it (or find it again) in the settings.
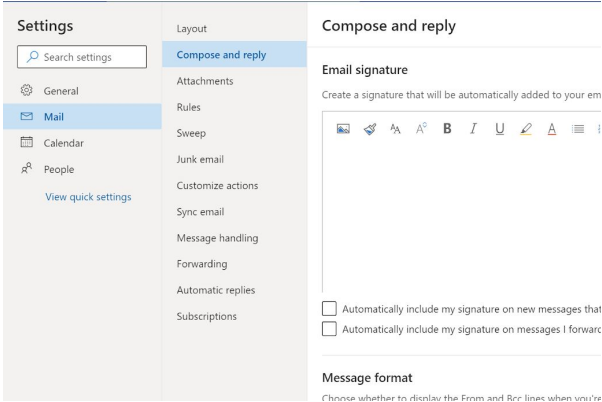
Principle Violated: Visibility, Recognition Rather than Recall	**Description:** There are a lot of settings listed, and they aren't necessarily in order of what users would find important. The useful settings are hard to find.
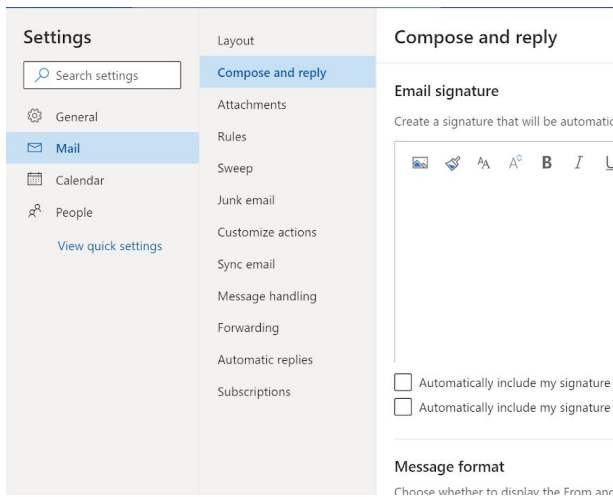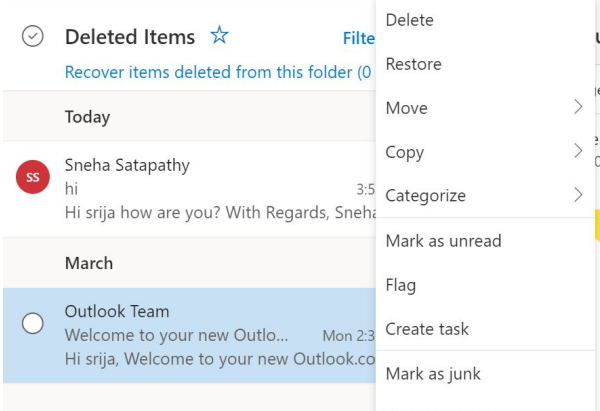
Recommendation: Organize the setting so the most popular ones are easier to find, or place them in a "quick settings" pane as mentioned previously.

Add a Signature

Signature Path
Severity: Low
User Issues: 2/6 participants exhibited confusion in finding the signature setting.

Principles Violated: Visibility, Discoverability	**Description:** It takes 4 clicks to get to the signature settings.

Recommendation: Allow users to change or add a signature from the email compose screen.

Email Manipulation

Recover Email
Severity: Low
User Issues: 2/4 average participants exhibited some confusion during the restore email task. While 4/4 participants were able to successfully restore the email, there seemed to be a disconnect with what they were expecting and the "restore" option.

<table>
<tr>
<td>Principles Violated: Consistency and standards

</td>
<td>Description: The "restore" button isn't necessarily what users are expecting to recover their email.</td>
</tr>
</table>

Recommendation: Ensure that this verbiage is the same as other popular mail clients. The "restore" option could use more salience when the user is in the "deleted items" folder.

Sending Email
Severity: Critical
User Issues: All participants for this task, 5/5, had to verify that the email was sent via the "sent items" folder. While all of them thought it had been sent, they were still uncertain enough that they felt the need to double check.
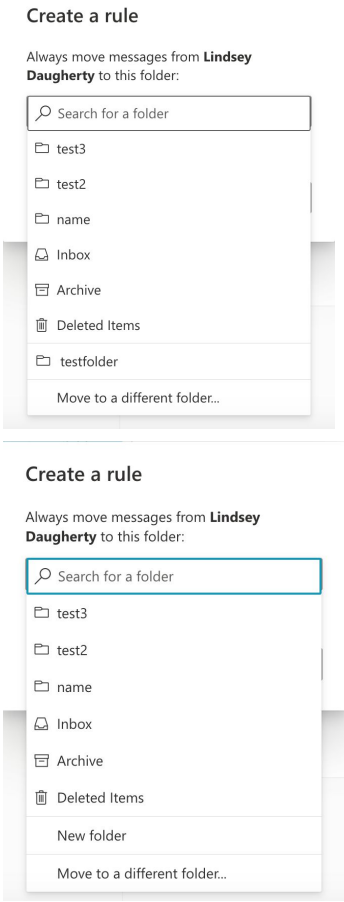
Principles Violated: Feedback
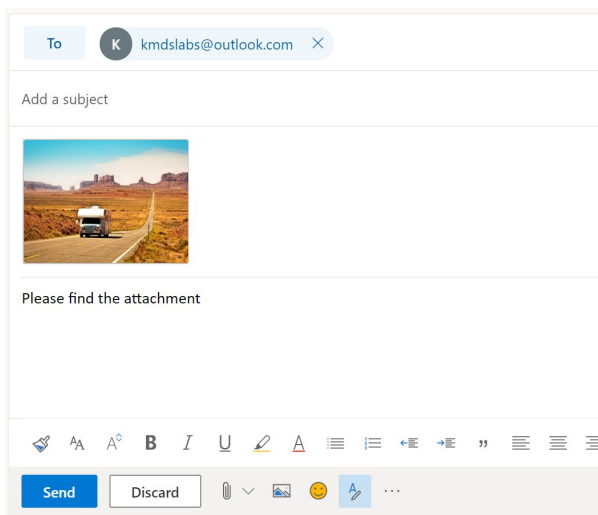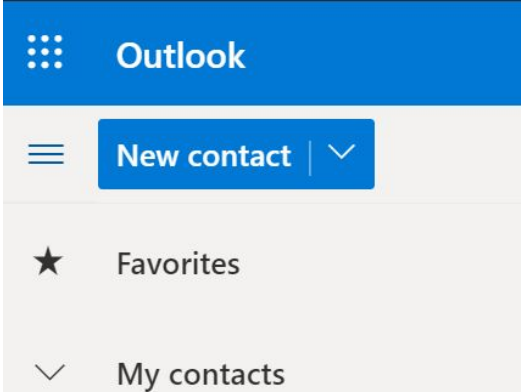
Description: Sending an email does not produce any sort of response from the email application and users cannot tell if the email was successfully sent.

Recommendation: Provide a message that appears briefly when email is sent.
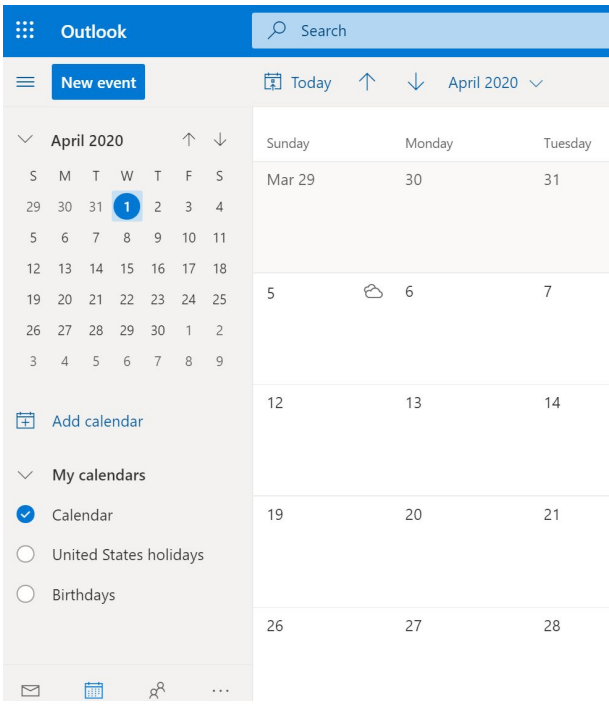
Organizing Email

Rules Folders
Severity: Medium
User Issues: 3/4 participants who used rules to sort their email experienced difficulty and frustration. Only one participant—a power user—was able to do so without difficulty; even the other power user struggled while doing it.Of the 3 that struggled, all 3 had problems due to the folder associated with the rule.

Principles Violated: Visibility

Create a rule

Always move messages from **Lindsey Daugherty** to this folder:

- Search for a folder
- test3
- test2
- name
- Inbox
- Archive
- Deleted Items
- testfolder
- Move to a different folder...

Create a rule

Always move messages from **Lindsey Daugherty** to this folder:

- Search for a folder
- test3
- test2
- name
- Inbox
- Archive
- Deleted Items
- New folder
- Move to a different folder...

Description: While the folder sidebar is pretty obvious, users who might try to create a folder from a rule can run into issues since it can be hard to tell if your folder was created or not—to have it appear you need to click the hard-to-see "Move to a different folder."

Recommendation: Newly created folders should show up first in the folder list.

Contacts

New Contact button
Severity: Medium
User Issues: While the task was presented to both average and power user participants as one that pointed towards contacts, only the power users thought to create a contact. Neither power user used the top "New contact" button to create their contact.

Principles Violated: Visibility 	**Description:** The New contact button lacks visibility since it blends in with the bar above it.

Recommendation: Give the call to action buttons more salience so they do not blend in to navigation.

Calendar

New Event button
Severity: Medium
User Issues: 1/3 average participants had an extremely difficult time creating a calendar item, and even said "Well, I didn't see this here" while indicating the New event button. Only 1 average participant used the "New event" button.

Principles Violated: Visibility	**Description:** The New event button lacks visibility since it blends in with the bar above it.

Recommendation: Give the call to action buttons more salience.

Multi-day Events
Severity: Medium
User Issues: 1/2 power user participants completed the task slower than expected, in part due to some time spent in finding the end calendar date; one of the average users was unable to complete the calendar task because he could not figure out how to make an event go multiple days.
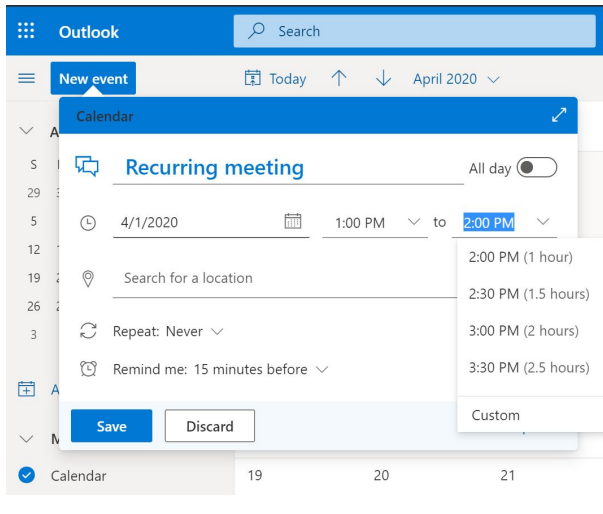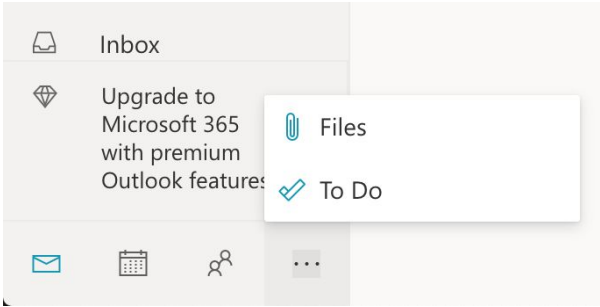
Principles Violated: Visibility and Discoverability	**Description:** Once a user goes to create an event, they will realize that it is easy to create an event for just one day but setting it up for multiple days is a much bigger challenge. The user is required to click "Custom" to set it for multiple days, which is not intuitive.

Recommendation: Either have a multi-day option or day selector that is more obvious.

To Do List

To Do icon
Severity: High
User Issues: 1/4 average user participants were unaware of "To Do" lists and completed the task using Notes instead. 3/4 average user participants commented that they thought it would be hard for people to find the "To Do" feature.

Principles Violated: Visibility	**Description:** The "to do" list option is hidden under the three dots menu. Users may not notice it there.

Recommendation: Make the To Do button more noticeable in the interface. Participants seemed to expect an icon elsewhere.

To Do Task Header
Severity: Medium
User Issues: Of the average users who made a to do list, 2/3 experienced frustration since they were unable to create a group of tasks (or tasks with a header item); this was exhibited by the utterances they made. For one user, P5, the utterances turned into comments as he told us "I don't like this at all."

Principles Violated: Consistency and standards
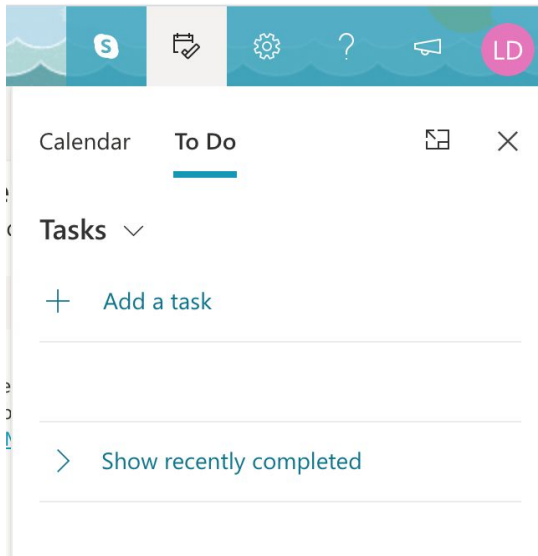
Description: If users click the menu in the upper right of the browser, they will realize that they cannot name the task list or group the task list. They can only assign individual tasks there.

Recommendation: Allow users to create a task list header from this pane.

Away Message

Away Message path
Severity: Medium

User Issues: The majority of participants (4/6) were able to complete the away message task in 15 seconds or less. Both power user participants (2/2 and 2 of the average users (2/4) quickly completed the task. The remaining 2 average user participants both took around 50 seconds to complete the task and did so with some obvious difficulty.
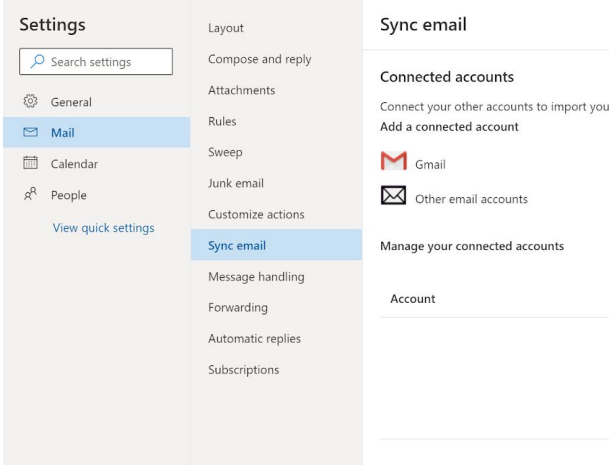
Principles Violated: Visibility and discoverability 	**Description:** Setting an away message takes 4 clicks to get to and the "Automatic replies" name might not be clear to users who are expecting something more like "Out of office replies" or an "Away message."
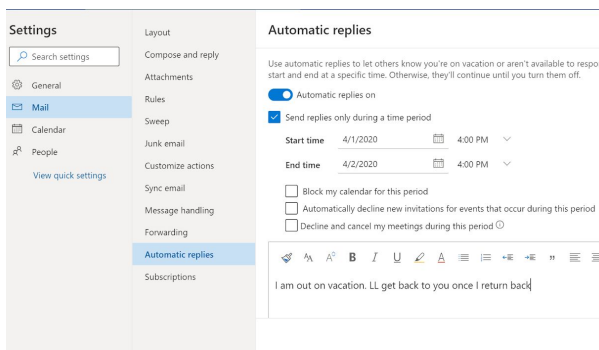
Recommendation: Make the process to set an away message more streamlined, perhaps allowing users to set it from the email composition screen.

Importing Email

Importing Email path
Severity: Medium
User Issues: Out of the 2 power user participants given the task to import their email, only 1 was able to successfully complete it. That participant admitted that he would not have figured out it was located under "Sync."

<table>
<tr>
<td>

Principles Violated: Visibility and discoverability

</td>
<td>

Description: The setting is buried by three clicks.

</td>
</tr>
</table>

Recommendation: Make the option to add an email account more visible; perhaps even in the quick settings pane.

"Sync"
Severity: High
User Issues: Out of the 2 power user participants given the task to import their email, only 1 was able to successfully complete it. That participant admitted that he would not have figured out it was located under "Sync."
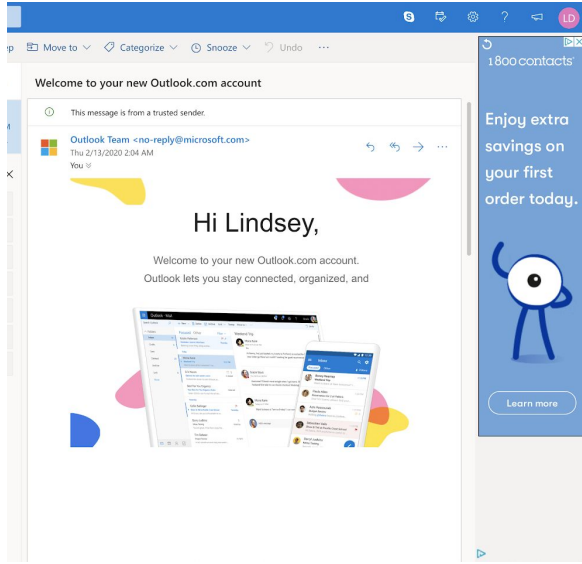
Principles Violated: Match between system and real world	**Description:** The feature is called "Sync email" instead of "Connect accounts" or even "Connected accounts" which is confusing to users.
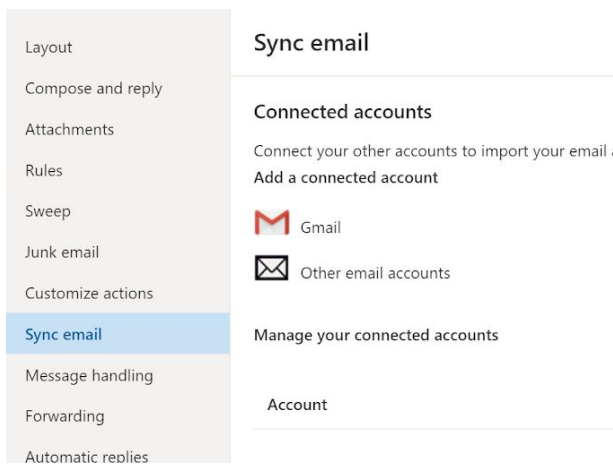
Recommendation: Make the name of this feature something that users expect.

Overall Appearance & Functionality

Ads
Severity: High
User Issues: 2/4 participants who could see ads (as opposed to 2 who used ad blocker and could not) were unhappy about them.

Principles Violated: Spatial Grouping ![Outlook welcome email with 1800contacts ad on the side]	**Description:** The ad on the side does not follow Gestalt principles since it is not contained well within the space.

Recommendation: Place the ad further away from the content and contain it completely.

Summary

First interactions with Outlook.com leave room for a lot of improvement. First impressions mean a lot, even in the virtual world, and email service is no exception. First time users will be less forgiving of deficiencies so companies should strive to create a near flawless experience. When users reach Outlook.com they are greeted initially by a nicely presented marketing page. However, this marketing page belabors the point of Outlook.com, or at least presents information in an easily glossed over and forgettable manner. Especially if Microsoft aims to sell people on its premium service, the benefits of premium should be laid out with good visibility, and more importantly, make a good value proposition.

If we follow the user along this journey, their next interaction with Outlook.com is via an account creation process that will likely frustration them. They are likely to not correctly solve the captcha puzzle in their first try, and if they choose an inappropriate password they'll be left wondering "why didn't you just tell me the requirements for the password originally?" At a minimum, the interface should keep the user's input birthday and other information stored so the user doesn't need to re-enter information if there is an error.

If they are successful in creating an account however, their experience improves. They are met with an experience that appears to have all the same functionality as their previous email provider, and most will probably appreciate the clean design of the interface. With the exception of no user feedback when an email is sent, most users may only be mildly frustrated by the other deficiencies of the service.

Related to this user's journey, two larger recommendations we have include changes to how rules are set up, and changes to how users view and access advanced settings. Setting up rules in outlook.com is sometimes frustrating because it is unclear if a rule went into effect, and if your folder was created or not. We recommend that newly created folders show up first at the top of the folder list. For accessing advanced settings, we feel the cog wheel should take you directly there, without having a frustrating second click. In addition, the advanced settings should be re-organized by frequency of use and some of the title names should be renamed to make more sense.

Most of our other recommendations are to have proper Visibility, Discoverability, and Consistency and Standards for certain Outlook.com features. While they would greatly improve the overall experience of a user, they are not showstoppers. Nevertheless we strongly recommend these quality of life improvements because, while individually they may seem insignificant, together these small deficiencies decrease the overall experience. On a positive note, most of these changes only require slight redesign—like the "New contact" button—or only require slight text changes like "Automatic replies".

Overall, Outlook.com is not a bad service: we only have two "critical" recommendations. Fixing those would give users a much better and modern experience when using Microsoft's web-based email client. Following our other recommendations would streamline the user experience and give Outlook.com a real leg to stand on when comparing with competitors.

Contact Info

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Appendices

Appendix A: Sample Recruitment Ads

Craigslist Ad for Average and Power Non Outlook users

CL SF bay area > san francisco > gigs > event gigs

reply

Participants wanted for a Paid Usability Study ($200/hour) (Remote session)

Hello,

We are looking for people who are 18 years and over who may be interested in participating in our paid usability study of 60 minutes. If you are selected, you will be paid $200 for your participation.

You will be required to do some tasks related to an email service. Followed by some questions about your perception and the overall experience of using the email service. In order to qualify, for the study you need to be using or have used an email application, have full dexterity in at least one hand, have no major vision issues, can speak and write fluent english and has no cognitive impairments.

If you are interested in participating,
Please email us at KMDSLabs@outlook.com with your contact information or call 951-452-2340.

- do NOT contact me with unsolicited services or offers

© craigslist - Map data © OpenStreetMap
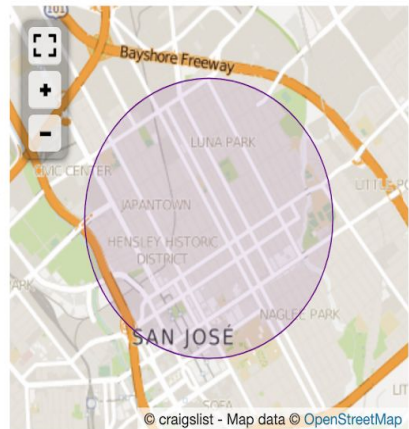
(google map)

compensation: **$200 per hour**

Craigslist Ad for Average and Power Outlook users

---

reply

Participants wanted for a Paid Usability Study ($200/hour) (Remote session)
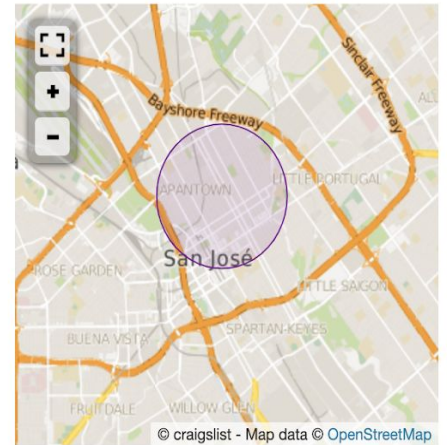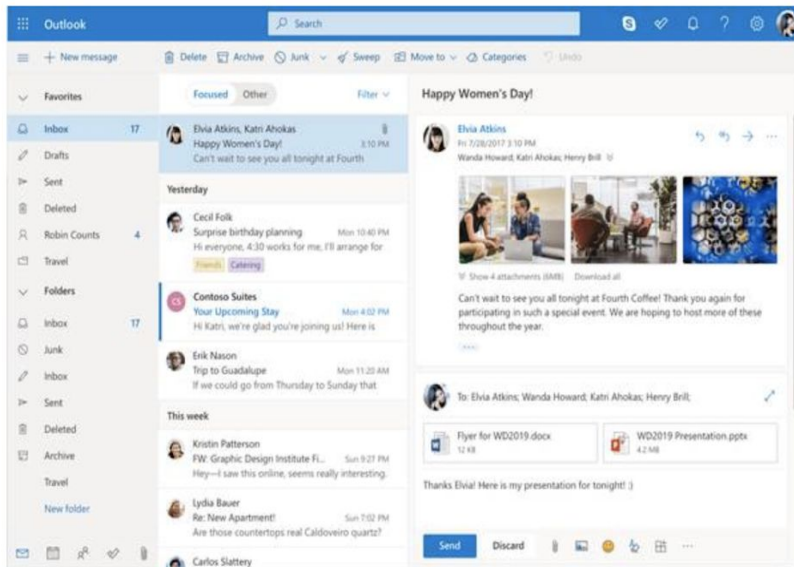
(google map)

compensation: **$200 per hour**

Hello,

We are looking for people who are 18 years and over who may be interested in participating in our paid usability study of 60 minutes. If you are selected, you will be paid $200 for your participation.

You will be required to do some tasks related to Outlook.com. Followed by some questions about your perception and the overall experience of using the email service. In order to qualify, for the study you need to be using or have used an Outlook.com, have full dexterity in at least one hand, have no major vision issues, can speak and write fluent english and has no cognitive impairments.

If you are interested in participating,
Please email us at KMDSLabs@outlook.com with your contact information or call 951-452-2340.

LinkedIn Ad

Hello everyone,

I am humbly reaching out to my network in search of participants for a study my team and I are running as a requirement for SJSU's ISE 215 course: Usability Evaluation and Testing.
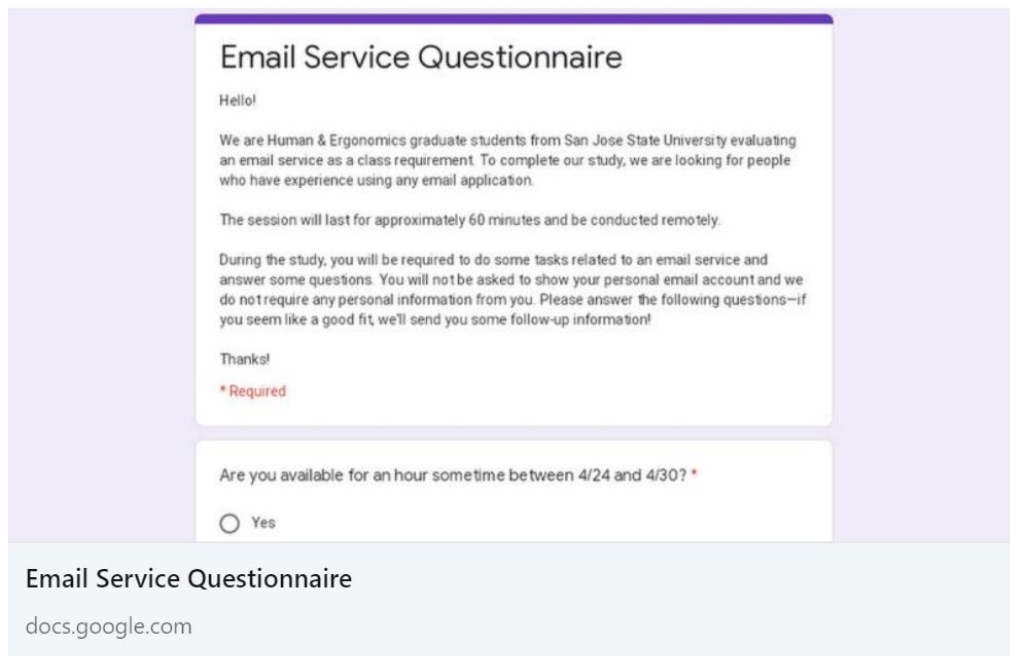
To account for current events, this will be a 60-minute remote study session where participants will be asked to do some tasks using an email service, followed by some questions about your perception and your overall experience.

If you have an hour to spare between 4/24 and 4/29 and would like to help me and my team out, we would be very grateful.

If you are interested in participating, check out our Google Form:
https://lnkd.in/g7gppdP

Thanks

Email Service Questionnaire

docs.google.com

👍 2

Facebook Ad

Sagarika Kanchibail

Just now ·

Hello everyone,

I am humbly reaching out to my network in search of participants for a study my team and I are running as a requirement for SJSU's ISE 215 course: Usability Evaluation and Testing.

To account for current events, this will be a 60 minute remote study session where participants will be asked to do some tasks using an email service, followed by some questions about your perception and your overall experience. At the end of our study, enjoy a coffee on us with a $5 gift card.

If you have an hour to spare between 4/24 and 4/29 and would like to help me and my team out, we would be very grateful.

If you are interested in participating, check out our Google Form: https://forms.gle/gXEqr9wK5fsHH5VP6

Thanks 😊

Email Service Questionnaire

Hello!

We are Human & Ergonomics graduate students from San Jose State University evaluating an email service as a class requirement. To complete our study, we are looking for people who have experience using any email application.

The session will last for approximately 60 minutes and be conducted remotely.

During the study, you will be required to do some tasks related to an email service and answer some questions. You will not be asked to show your personal email account and we do not require any personal information from you. Please answer the following questions—if you seem like a good fit, we'll send you some follow-up information!

Thanks!

* Required

Are you available for an hour sometime between 4/24 and 4/30? *

○ Yes

DOCS.GOOGLE.COM

Email Service Questionnaire

Appendix B: Condition Log

Participant #	Email Application	Email User Type
1	any	naive
2	any	naive
3	any	naive
4	any	naive
5	any	naive
6	any	naive
7	any	intermediate
8	Outlook.com	intermediate
9	any	intermediate
10	Outlook.com	intermediate
11	any	intermediate
12	Outlook.com	intermediate
13	any	intermediate
14	Outlook.com	intermediate
15	any	power
16	Outlook.com	power
17	any	power
18	Outlook.com	power
19	any	power
20	Outlook.com	power
21	any	power
22	Outlook.com	power

Appendix C: Screening Form

Thanks for responding to our ad. As you probably know, we are currently planning a study to try to improve the user interface of an email service. User experiences and feedback from participants like yourself are really important and they could even lead to direct changes to the products you use. That being said, we're looking for many types of people for this study, so I'd like to ask you some questions.

Question	Answer
1. How old are you? a. [Knocks out people younger than 18]	

2. [If given a single answer] Is this a personal account, or is this used for work?
 	
[If given multiple answers] Are they personal accounts, or are any used for work?
 	
   a) Determine which ones which
   b) Could you rank your experience with each email service you use?	

3. How do you usually access your email?
   a. Press further if ambiguous, get specific names of software/access points, multiple answers ok
   b. *Follow up if necessary*: Some people use email managing software, like Apple's "Mail" mobile app, while others may access their mail directly at Gmail's website, mail.google.com"	

4. We're looking for both novice and advanced email users, so there are no wrong answers for this next question. How often do you check your email or otherwise use your email software?
 	
    a. Be specific, get specific numbers
    b. *Follow up if necessary*: Do you use it once a week, multiple times a week, once a day, multiple times a day?	

5. How many emails do you send a day?	
6. Are there any advanced or additional features of email that you use?	
7. What do you occasionally do with that email service?	
8. In your opinion what's the most useful feature about that email service? a. [Knowledge probe check for advanced users]	
9. We're looking for people both with and without any manual dexterity problems, which are you? a. [Knocks out people who may have difficulties using a mouse/touch screen]	
10. What's a mobile number we can reach you at? a. [Knocks out people without a phone]	
[Outro for Screener] Great. Thanks for getting in contact with us. If you think you know anyone that would be good for this study feel free to give them our number, or send them our ad. We'll be in touch if you get selected.	

Appendix D: Consent Form

KMDS Labs would like to thank you for participating in our study. The purpose of this study is to determine key issues with Outlook.com and provide suggestions for improvements. Upon agreement of your participation, you will be required to complete several activities using the email service and provide input on your overall experience and perception of the product. The study will last about 60 minutes. At the end of the test, you will be compensated with a $5 giftcard for your time.

Agreement:
I volunteer to participate in this study conducted by KMDS Labs. I understand that the test is designed to gather information about the product. I will be one of 22 people being interviewed for this study.

1. My participation in this study is voluntary. I understand that I am paid for my complete participation. I may withdraw and discontinue participation at any time. I am aware that the study will be recorded by KMDS Labs.
2. I understand that the study will be thought-provoking. If, however, I feel uncomfortable in any way during the session, I have the right to decline to answer any question.
3. Participation involves use and release of video and audio taken by KMDS Labs. I understand it is for research purposes only and my name and image will not be used for any other purpose. KMDS Labs will protect the anonymity of participants as much as is feasible.
4. I understand that the purpose of this study is to make the Outlook.com email service more useful and usable in the future.
5. I agree to raise any concerns with the moderator. I understand I can leave at any time but that if I leave before the session is completed I will forfeit any and all compensation.
6. I have been given a copy of this consent form.

Please check one of the following:

❑ **YES**, I have read and understand the explanation provided above. I have all my questions answered to my satisfaction, and I voluntarily agree to participate in this study.

❑ **NO**, I choose not to participate in the study.

_____   _____

Signature   Date

_____

Printed Name

Appendix E: Session Introduction

This section gives the introduction spiel, which explains the goal of the study. This is read to the participants at the beginning of the study.

Introduction

Moderator: Thank you for participating in our study today. For the next 60 minutes, please consider yourself as an important member of our team as you use the Outlook.com email service. As you may be aware, we're hoping to discover if Outlook.com is working how users expect it to or if there are usability issues that need to be fixed.

During the course of this session I'll ask you to complete some activities and then ask you some questions related to those activities. We want to see how you interact with Outlook.com and solicit your feedback as a user. Any difficulties you encounter can be valuable feedback to us, so don't worry about making mistakes or struggling to complete an activity! There are no right or wrong responses, there's just potential for Outlook.com to improve.

Please say "done" when you are finished with the activity or if you would like to move on.

If you get stuck at any time, you are welcome to use Outlook.com's built-in help. And if you would like to end your participation in the study at any time just let me know.

Do you have any questions for me before we begin? If not, let's get started.

Appendix F: Script

Average User Script

Supplies
- Mac desktop computer   - Multiple browsers installed (Chrome, Firefox, Safari, Edge)   - Parallels installed   - Windows installed   - All browsers open and set to outlook.com   - Wifi active   - Images trip.jpg and graph.jpg on desktop   - Computer peripherals   - Mouse   - Mousepad   - Business cards (prop)   - Desktop paper file   - Task sheets   2 office chairs   - Desk

Introduction
Moderator: Thank you for participating in our study today. For the next 60 minutes, please consider yourself as an important member of our team as you use the Outlook.com email service. As you may be aware, we're hoping to discover if Outlook.com is working how users expect it to or if there are usability issues that need to be fixed. During the course of this session I'll ask you to complete some activities and then ask you some questions related to those activities. We want to see how you interact with Outlook.com and solicit your feedback as a user. Any difficulties you encounter can be valuable feedback to us, so don't worry about making mistakes or struggling to complete an activity! There are no right or wrong responses, there's just potential for Outlook.com to improve. If you get stuck at any time, you are welcome to use Outlook.com's built-in help. And if you would like to end your participation in the study at any time just let me know. Do you have any questions for me before we begin? If not, let's get started.

Initial Questions	
Moderator: We'll begin with a few brief questions.	
Q: What do you primarily use your email account for—sending or receiving email, tracking appointments, scheduling meetings, etc?	**Verbal Comments:**
Q: What email service do you use the most?	**Verbal Comments:**
Q: What email features do you use?	**Verbal Comments:**

1. Premium Features and Initial Impressions

Premium Features and Initial Impressions	
Moderator: Please navigate to Outlook.com.	
Moderator: The first thing I'd like you to do is to spend just a few minutes reading this page. Let me know when you feel like you've read through it and I'll ask you a few questions.	**Observation/Comments:** <u>Note any confusion, hesitations, or difficulties during the process</u>. **Verbal Comments:**
PROBE: From what you saw on this page, what are the main features of Outlook.com?	**A:** ❑ Email ❑ Calendar ❑ People ❑ Tasks ❑ Search ❑ Other: **Verbal Comments:**
[Skip for Primary Outlook.com users] **PROBE:** Do you think Outlook.com has all the same features as your current email provider? Why or why not?	❑ Yes ❑ No **Verbal Comments:**

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PROBE: Did you notice that there is a Premium version of Outlook.com?	❑ Yes ❑ No **Verbal Comments:**
PROBE: What are the benefits to purchasing the Premium version of Outlook.com? **[if they have difficulty answering, you can ask them the answers to see if they can recognize it instead]**	**A:** ❑ Ad-free interface ❑ Custom domains ❑ Enhanced/advanced security ❑ Full desktop version of Office ❑ Latest versions of Word, Excel, and PowerPoint ❑ 1 TB cloud storage **Verbal Comments:**
Q: Knowing that these are the features included in the Premium version of Outlook.com, how interested are you in the Premium version on a scale of 1-7, with 1 being not at all interested and 7 being very interested? **[If a low score]** What feature would make you more interested in a Premium version?	1=Not interested 7=Very Interested **Verbal Comments:**
Q: How many ads do you think would be acceptable in the Outlook.com layout?	**Verbal Comments:**
PROBE: Based on what you saw on this marketing page, do you find Outlook.com (not this page) visually appealing? Why or why not?	❑ Yes ❑ No **Verbal Comments:**

2. Register

Register
Moderator: Now we are going to imagine that you will be visiting a popular theme park in Florida once coronavirus quarantine is lifted. For now, we'll pretend that it's this summer. You want to open a new email account so you can keep your trip-related emails separate from your normal account. You will be completing activities in your new email account in preparation for your trip.

Moderator: The first thing I'd like you to do is to go ahead and register a new account on Outlook.com. You do not need to use your actual name, age, or any other personal info. When you're finished, please let me know.
 	
Do you have any questions before you begin?
	Observation/Comments:
	Note any confusion, hesitations, or difficulties during the process.
	
	Time on task: _____ minutes
	
	❑ Clicked *Create free account*
	❑ Enters an email address
	   ❑ Encountered difficulties creating address
	   ❑ Used suggested email address
	❑ Enters password
	   ❑ Password does not meet all criteria
	❑ Taps *Next* to progress registration
	❑ Enters First & Last name
	❑ Taps *Next* to progress registration
	❑ Enters Birthday
	❑ Selects Country/region
	❑ Selects Birthday
	❑ Clicks *Next* to progress registration
	❑ Enters Captcha
	   ❑ Clicks 'New' (Captcha)
	   ❑ Clicks 'Audio' (Captcha)
	   ❑ Fails
	❑ Clicks *Next* to progress registration
	
	Verbal Comments:

PROBE: Did the registration process feel easy to do? Why or why not?	❑ Yes ❑ No **Verbal Comments:**
<mark>[if they explained confusion etc in previous question skip this]</mark> **Q:** Was there anything you struggled with or found difficult or confusing during the process? **[If yes]** explain	❑ Yes ❑ No **Verbal Comments:**
Q: Overall, how satisfied were you with the registration process on a scale from 1-7 with 1 being not at all satisfied and 7 being very satisfied?	1=Not Satisfied 7=Very Satisfied **Verbal Comments:**

[If a low score] What would you change about the registration process?	

3. Setup Account

Setup Account (Goal-Based)	
Moderator: Imagine you will be using this new email account as your primary email from now on. You want to set it up to meet your daily needs. If you aren't sure where to start, think about how your current primary email account is set up and try to mimic that here. Things like your email signature, profile image, account settings, junk mail settings, timezone, etc.	
Moderator: Go ahead and set up your account however you would like. I'll give you five minutes to do it, but let me know if you are finished before I call that time is up.	**Observation/Comments:** • Note any confusion, hesitations, or difficulties during the process. • Document path. ❑ Used Outlook.com help **Verbal Comments:**
Q: Rate your experience setting up your account on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**
Q: Was there anything you wanted to set up but were unable to? **[If yes]** Explain	❑ Yes ❑ No **Verbal Comments:**
PROBE: Did you feel like the layout of Outlook.com helped you in setting up your account? Why or why not?	**Verbal Comments:**
PROBE: Can you explain what "Focused" emails are?	**A:** What Outlook.com decides are "important' emails. **Verbal Comments:**
Q: Rate your feelings on the account's visual	1=Not at all appealing 7=Very Appealing

appearance on a scale of 1-7, with 1 being not at all appealing and 7 being very appealing **[if low]** Explain	**Verbal Comments:**

4.   Add a Signature <mark>[skip if they already set up a signature earlier]</mark>

Adding a Signature	
Moderator: Since you are going on vacation soon and anticipate needing to email people from this account via your cell phone, you should set up a permanent message to the bottom of all your emails that says "Sent from my iPhone."	
Moderator: For this next activity, I'd like you to add a permanent message to the bottom of all of your emails that says "Sent from my iPhone."	**Observation/Comments:** • Note any confusion, hesitations, or difficulties during the process. • Document path ❑ Set email signature in previous task ❑ Did not set email signature previously ❑ Clicks *Gear wheel* icon on top right ❑ Clicks *View all Outlook settings* ❑ Clicks *Mail* ❑ Clicks *Compose and reply* ❑ Enters text ❑ Clicks *Automatically include my signature on new messages that I compose* ❑ Clicks *Automatically include my signature on messages I forward or reply to* ❑ Clicks *Save* ❑ Successfully completed set email signature task **Verbal Comments:**
Q: Rate your experience setting up your email signature on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**
<mark>**[if they explained confusion etc in previous question skip this]**</mark> **Q:** Was there anything you struggled with or found difficult or confusing while setting the	❑ Yes ❑ No **Verbal Comments:**

email signature? **[If yes]** explain	

5. Email Manipulation

Email Manipulation
Moderator: Next, we'll have you do some basic email activities.

Task 5A: Send an Email	

Moderator: For this activity, I'd like you to write to us about your upcoming trip. Our email is kmdslabs@outlook.com	**Observation/Comments:**
	 Note any confusion, hesitations, or difficulties during the process.
	
	 Time on task: _____ minutes
	
	 ❑ Clicks *New message*
	 ❑ Enters email address
	 ❑ Enters subject
	 ❑ Enters text content
	 ❑ Clicks *Attach*
	 ❑ Selects file from computer
	 ❑ Clicks *Send*
	    ❑ Clicked top *Send*
	    ❑ Clicked bottom *Send*
	
	 ❑ Successfully performs send email task
	
	 Verbal Comments:

Q: Did you successfully send an email? **[If yes]** How do you know that you successfully sent an email?	❑ Yes ❑ No **Verbal Comments:**
Task 5B: Delete and Recover an Email	
Moderator: Now I'd like you to pick two emails and remove them.	**Observation/Comments:** Note any confusion, hesitations, or difficulties during the process. ❑ Clicks *Delete* ❑ Top left icon

	❑ Right-clicks the email and selects from the menu ❑ Hovers on an email and clicking the trash can that appears ❑ Clicking on the more options (ellipses) menu that appears when reading an individual email ❑ Hits the keyboard *Delete* key ❑ Drags the email to the *Deleted Items* folder ❑ Successfully performs delete task **Verbal Comments:**

Moderator: Whoops, you didn't actually want to remove those emails. Can you get them back?	**Observation/Comments:**
	<u>Note any confusion, hesitations, or difficulties during the process.</u>
	
	❑ Clicks *Deleted Items*
	❑ Restores Email
	   ❑ Clicks top left *Restore*
	   ❑ *R*ight clicks the deleted email and selects
	     Move
	   ❑ Right clicks the deleted email and selects
	     Restore from menu
	   ❑ Physically drags the deleted email to *Inbox* (or other folder)
	
	❑ Successfully performs undo task
	
	Verbal Comments:

Q: Did you successfully restore an email so it wasn't in danger of being deleted?	❑ Yes ❑ No **Verbal Comments:**
<mark>**[If they deleted the emails one at a time earlier]**</mark>	❑ Correct ❑ Incorrect **Verbal Comments:**

Q: Were you aware that you can select multiple emails at once? Do you know how to do that?	
PROBE: Will items in the *Deleted Items* folder be automatically deleted?	**A:** No. ❏ Correct ❏ Incorrect **Verbal Comments:**

Task 5C: Reply to an Email using Rich Text Formatting

Moderator: Pretend you won free tickets to Disney World! Find this email and reply back with "Thanks!" (in **bolded** letters) and add a thumbs up emoticon.	**Observation/Comments:**
	Note any confusion, hesitations, or difficulties during the process.
	
	❏ Locates email in *Focused* inbox
	❏ Searches for email
	❏ Replies to email
	   ❏ Clicks *Reply* arrow on top-right of email
	   ❏ Clicks *Reply* text at bottom of email
	❏ Bolds the text
	   ❏ Clicks the *Bold* icon and then types
	   ❏ Selects the text and then hits the *Bold* icon
	   ❏ Clicks command-B and then types the text
	   ❏ Selects the text and then clicks command-B
	❏ Clicks the happy face icon
	❏ Clicks the thumbs up icon
	
	❏ Clicks *Send*
	
	❏ Successfully performs reply task
	
	Verbal Comments:

ERROR DEBRIEF **Q:** I noticed that when you did _____, the site indicated an error. Can you explain to me what happened there?

6.   File an Email

Filing Email	
Moderator: As you can see, you have been receiving a lot of email in a short period of time. You don't want to have to wade through mountains of email to find information about, for instance, your flights.	

Moderator: For this activity, I'd like you to find the email containing your departure plane ticket information (from San Jose Airport) for your upcoming trip. Then file this email with your other flight emails to make it easier to quickly access.	**Observation/Comments:**
	• <u>Note any confusion, hesitations, or difficulties during the process</u>.
	• <u>Document query terms</u>
	
	Time on task: _____ minutes
	
	❑ Locates email
	  ❑ Searches for it in the search box
	  ❑ Scrolls through emails until they find it
	❑ Clicks *New folder*
	❑ Enters a name
	❑ Files the email
	  ❑ Drags the email into a folder
	  ❑ Right clicks the email and selects *Move to* from the dropdown
	  ❑ Selects *Move to* from the top navigation
	  ❑ Categorizes the email
	
	❑ Successfully performs search and file task
	
	Verbal Comments:

Q: Did you successfully find and file the email? How do you know you were successful in finding the email and filing it with similar emails?	❑ Yes ❑ No **Verbal Comments:**
Q: Was there anything you struggled with or found difficult or confusing while doing this? **[If yes]** explain	❑ Yes ❑ No **Verbal Comments:**

7. Add a Contact

Add Contact (Goal-Based)	
Moderator: You found a travel agent through a company called "Reach the skies.com". They emailed you their business card and you would like to store it for later.	
Moderator: I'd like you to find a way to store the business card "Reach the skies.com" using your email account.	**Observation/Comments:** <u>Note any confusion, hesitations, or difficulties during the process.</u> **Verbal Comments:**
Q: Rate your experience storing the business card in your email account on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**

8. Add Trip to Calendar

Add Trip to Calendar	
Moderator: Let's move on to the next activity.	

Moderator: For this activity, I'd like you to mark your calendar for your trip to Florida, which is from June 10th to June 20th.	**Observation/Comments:**
	• <u>Note any confusion, hesitations, or difficulties during the process.</u>
	• <u>Document path</u>
	
	Time on task: _____ minutes
	
	❑ Clicks calendar icon
	   ❑ How quickly did they find this icon?
	   ❑ Encountered difficulties finding icon?
	   ❑ What did they try before finding this icon?
	❑ Creates new calendar item
	   ❑ Clicks *New event*
	   ❑ Clicks day on calendar
	   ❑ Double clicks day on calendar
	❑ Enters title
	❑ Enters start date
	   ❑ Clicks *All day*
	   ❑ Clicks globe icon to the right of *to* _____
	   ❑ Clicks *more options*

	❑ Clicks *Save*
	❑ Successfully marked calendar.
	Verbal Comments:
Q: Was there anything you struggled with or found difficult or confusing while configuring your calendar? **[If yes]** explain	❑ Yes ❑ No **Verbal Comments:**
Q: Rate your experience making a calendar event on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**
Q: If you could change anything about the process of adding a calendar event, for example the design, the content of the screen, instructions, etc. what would you change?	**Verbal Comments:**

9. Make To Do List

Make To Do List
Moderator: As your trip approaches, you're having a hard time keeping track of all of the things you need to get done. One of the last things you need to do is go shopping and purchase a few items.
Task 9: Making a shopping list

| **Moderator**: For this activity I'd like you to create a new shopping list. It should have a name and these three items: 1) sunblock 2) shoes 3) hat | **Observation/Comments:**
 • Note any confusion, hesitations, or difficulties during the process.
 [There are a couple variations to this task: they may make the agenda as a task and add steps to the task, or they might just email the list to themselves. They might even add it as a calendar event.]

 ❑ Clicks *3 dot* icon on bottom left
    ❑ How quickly did they find this icon?
    ❑ Encountered difficulties finding icons?
    ❑ What did they try before finding this icon? |

	❑ Clicks *To Do*
	❑ Clicks *New list*
	❑ Enters list name
	❑ Enters tasks
	   ❑ Clicks Enter on keyboard
	   ❑ Clicks *Add*
	
	❑ Successfully created a shopping list
	
	Verbal Comments:

Q: <mark>[If they did NOT create a shopping list]</mark> Were you aware that you could also create a "to do" list to complete this task? Do you know where to go to do that? **[If no]** What do you think would have helped you realize that you could create a "to do" list?	❑ Yes ❑ No **Verbal Comments:**
Q: <mark>[If they did NOT create a note]</mark> Were you aware that you could also create notes to complete this task? Do you know where to go to do that? **[If no]** What do you think would have helped you realize that you could create notes?	❑ Yes ❑ No **Verbal Comments:**

10. Set an Away Message

Set an Away Message
Moderator: In preparation for your trip, you want people to know that you will be gone and that you might be slow to reply.

Moderator: I'd like you to set an away message for your vacation, so that when people email you they get an "Out of the office" response. This should be set for 6/10-6/20.	**Observation/Comments:**
	• Note any confusion, hesitations, or difficulties during the process.
	• Document path and any queries
	
	Time on task: _____ minutes
	
	❑ Clicks cog icon to open *Settings*
	   ❑ Searches in *Settings*
	   ❑ Clicks *View all Outlook settings*

	❑ How quickly did they find this icon?
	❑ Encountered difficulties finding icon?
	❑ What did they try before finding this icon?
	❑ Clicks *Mail*
	❑ Clicks *Automatic replies*
	❑ Clicks *Turn on automatic replies*
	❑ Clicks *Send replies only during a time period*
	❑ Enters a start time and end time
	❑ Enters a message
	❑ Clicks *Save*
	   ❑ Clicks X (Exit menu) before clicking save
	   ❑ Clicks *Save*
	
	❑ Successfully set an away message.
	
	Verbal Comments:

Q: Was there anything you struggled with or found difficult or confusing while setting the away message? **[If yes]** explain	❑ Yes ❑ No **Verbal Comments:**
Q: Rate your experience setting up the emails to be automatically sorted on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**

11. Difficulties Wrap-up [only do this if there was actually a problem]

Difficulties Wrap-up	
Moderator: We're almost done! I'd just like to take a minute to recount some of the difficulties you experienced today using Outlook.com and get your input on how things could be improved.	
[Navigate to an area that the participant had difficulty with. If there were many, begin with the biggest issues] **Q:** I noticed you had a particularly difficult time attempting to do ____. Why do you think that happened? What would improve your experience?	**Verbal Comments:**

[continue as needed]	Verbal Comments:

12. Final Impressions

Final Impressions	
Moderator: The last thing I'd like to do is to get your thoughts and feelings on the overall look of Outlook.com and how user-friendly you felt it was.	
Q: Overall, how easy or difficult was it for you to use Outlook.com?	**Verbal Comments:**
Q: On a scale of 1-7, how visually appealing would you rate Outlook.com, with 1 being not at all appealing and 7 being very appealing? **[if low]** Explain	1=Not at all appealing 7=Very Appealing **Verbal Comments:**
Q: On a scale of 1-7 how acceptable is the current number of ads, with 1 being not at all acceptable and 7 being very acceptable? **[if low]** Explain	1=not at all acceptable 7=Very Acceptable **Verbal Comments:**
Q: What did you LIKE about Outlook.com?	**Verbal Comments:**
Q: What did you DISLIKE about Outlook.com?	**Verbal Comments:**
[Skip these for Outlook.com primary users]	
Q: Did Outlook.com act as expected or did it surprise you today?	**Verbal Comments:**
Q: How does Outlook.com compare to your current primary email provider?	**Verbal Comments:**
PROBE: Did you feel like Outlook.com had the same features as your current primary email provider? Why or why not?	❏ Yes ❏ No **Verbal Comments:**

Q: Would you consider using Outlook.com instead of your primary email provider? Why or why not?	❏ Yes ❏ No **Verbal Comments:**
[End skipped questions]	
Q: After having used Outlook.com, how interested are you in the Premium version on a scale of 1-7, where 1 is not at all interested and 7 is very interested? As a reminder, these are the Premium features ❏ Ad-free interface ❏ Custom domains ❏ Enhanced/advanced security ❏ Full desktop version of Office ❏ Latest versions of Word, Excel, and PowerPoint ❏ 1 TB cloud storage **[If low, follow up]**	1=not at all interested 7=Very Interested **Verbal Comments:**
Q: Is there anything else you would like us to know?	**Verbal Comments:**

Power User Script

Supplies
- Mac desktop computer   - Multiple browsers installed (Chrome, Firefox, Safari, Edge)   - Parallels installed   - Windows installed   - All browsers open and set to outlook.com   - Wifi active   - Images trip.jpg and graph.jpg on desktop   - Computer peripherals   - Mouse   - Mousepad   - Business cards (prop)   - Desktop paper file   - Task sheets   2 office chairs   - Desk

Introduction
Moderator: Thank you for participating in our study today. For the next 60 minutes, please consider yourself as an important member of our team as you use the Outlook.com email service. As you may be aware, we're hoping to discover if Outlook.com is working how users expect it to or if there are usability issues that need to be fixed. During the course of this session I'll ask you to complete some activities and then ask you some questions related to those activities. We want to see how you interact with Outlook.com and solicit your feedback as a user. Any difficulties you encounter can be valuable feedback to us, so don't worry about making mistakes or struggling to complete an activity! There are no right or wrong responses, there's just potential for Outlook.com to improve. If you get stuck at any time, you are welcome to use Outlook.com's built-in help. And if you would like to end your participation in the study at any time just let me know. Do you have any questions for me before we begin? If not, let's get started.

Initial Questions	
Moderator: We'll begin with some questions.	
Q: What email service do you use the most?	**Verbal Comments:**
Q: What do you primarily use your email account for—sending or receiving email, tracking appointments, scheduling meetings, etc?	**Verbal Comments:**
Q: What is your occupation?	**Verbal Comments:**
Q: Do you rely on advanced features of your email service in your everyday job?	**Verbal Comments:**
Q: What email features do you use and for what purpose?	**Verbal Comments:**

1. Initial Impressions - <mark>Competitor Users Only</mark>

Premium Features and Initial Impressions	
Moderator: Please navigate to Outlook.com	
Moderator: The first thing I'd like you to do is to spend just a few minutes reading this page. Let me know when you feel like you've read through it and I'll ask you a few questions.	**Observation/Comments:** <u>Note any confusion, hesitations, or difficulties during the process</u>**.** **Verbal Comments:**
PROBE: Based on what you've seen, what are the main features of Outlook.com?	**A:** ❑ Email ❑ Calendar ❑ People ❑ Tasks ❑ Search ❑ Other:

	Verbal Comments:
PROBE: Do you think Outlook.com has all the same features as your current email provider? Why or why not?	❑ Yes ❑ No **Verbal Comments:**
PROBE: Did you notice that there is a Premium version of Outlook.com?	❑ Yes ❑ No **Verbal Comments:**
PROBE: What are the benefits to purchasing the Premium version of Outlook.com? **[if they have difficulty answering, you can ask them the answers to see if they can recognize it instead]**	**A:** ❑ Ad-free interface ❑ Custom domains ❑ Enhanced/advanced security ❑ Full desktop version of Office ❑ Latest versions of Word, Excel, and PowerPoint ❑ 1 TB cloud storage **Verbal Comments:**
Q: Knowing that these are the features included in the Premium version of Outlook.com, how interested are you in the Premium version on a scale of 1-7, with 1 being not at all interested and 7 being very interested? **[If a low score]** What feature would make you more interested in a Premium version?	1=Not at all interested 7=Very Interested **Verbal Comments:**
Q: How many ads do you think would be acceptable in the Outlook.com layout?	**Verbal Comments:**
PROBE: Based on what you saw on this page, do you find Outlook.com visually appealing? Why or why not?	❑ Yes ❑ No **Verbal Comments:**

1. Original Impressions - <mark>Outlook.com Users Only</mark>

Premium Features and Original Impressions	
Moderator: Please navigate to Outlook.com	
Moderator: If you feel comfortable doing so, we'd really like to see your own Outlook.com account and walk me through your setup. <mark>[If they aren't comfortable doing so, skip]</mark>	**Verbal Comments:**
Q: What have you personalized the most? **[Ask and document any unique configuration items, e.g. rules, calendar settings, etc]**	**Verbal Comments:**
Q: Can you tell me what your biggest struggles were when you first began using Outlook.com?	**Verbal Comments:**
Q: What issues frustrate you the most using Outlook.com?	**Verbal Comments:**

Scenario
Moderator: Today we are going to imagine that you have started a small home business that, among other roles, requires you to be a project manager. You have already created an email account for your business on Outlook.com. You will be doing activities using your new business email account.

2. Log in

Log in	
Moderator: Please log in to Outlook.com using this account information so you can interact with your business emails.	
Moderator: Go ahead and login now. [Give the participant the account login and password.]	**Observation/Comments:** <u>Note any confusion, hesitations, or difficulties during the process.</u> ❏ Enters email address 　❏ Email address entered incorrectly ❏ Clicks *Next*

	❑ Enters password ❑ Password entered incorrectly ❑ Clicks *Sign in* ❑ Successfully performs login task **Verbal Comments:**
Q: if you could change anything about the login process, for example the design, the content of the screen, instructions, etc. what would you change?	**Verbal Comments:**

3. Setup Accounts <mark>**Competitor Users Only**</mark>

Setup Account (Goal-Based)	
Moderator: Imagine you will be using this new business email account on a daily basis. You want it to meet your daily needs. Set up your account however you'd like so it will facilitate your workflow. If you aren't sure where to start, think about how your current primary email account is set up and try to mimic that here. Things like your email signature, profile image, account settings, junk mail settings, timezone, etc.	
Moderator: Go ahead and set up this account however you would like. I'll give you around 5 minutes to do this. Let me know when you're done or if you need more time.	**Observation/Comments:** • Note any confusion, hesitations, or difficulties during the process. • Document path. ❑ Used Outlook.com help **Verbal Comments:**
Q: Rate your experience setting up your account on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**
Q: Was there anything you wanted to set up but were unable to? **[If yes]** Explain	❑ Yes ❑ No **Verbal Comments:**
PROBE: Did you feel like the layout of Outlook.com helped you in setting up your account? Why or why not?	**Verbal Comments:**

PROBE: Can you explain what "Focused" emails are?	**A:** What Outlook.com decides are "important' emails. **Verbal Comments:**
Q: Rate your feelings on the account's visual appearance on a scale of 1-7, with 1 being not at all appealing and 7 being very appealing **[if low]** Explain	1=Not at all appealing 7=Very Appealing **Verbal Comments:**

4.   Set Email Signature

Set Email Signature	
Moderator: Studies have shown that people are more forgiving of spelling or grammar mistakes if you have a message at the bottom of all your emails that says "Sent from my iPhone." For your next activity, you will add a message at the bottom of your emails.	
Moderator: Please go ahead and add a permanent message to the bottom of all of your emails that says "Sent from my iPhone."	**Observation/Comments:** • Note any confusion, hesitations, or difficulties during the process. • Document path ❑ Set email signature in previous task ❑ Did not set email signature previously ❑ Clicks *Gear wheel* icon on top right ❑ Clicks *View all Outlook settings* ❑ Clicks *Mail* ❑ Clicks *Compose and reply* ❑ Enters text ❑ Clicks *Automatically include my signature on new messages that I compose* ❑ Clicks *Automatically include my signature on messages I forward or reply to* ❑ Clicks *Save* ❑ Successfully completed set email signature task **Verbal Comments:**
Q: Rate your experience setting up your email signature on a scale of 1-7, with 1	1=Very Hard 7=Very Easy **Verbal Comments:**

being very hard and 7 being very easy. **[if low]** Explain	
Q: Was there anything you struggled with or found difficult or confusing while setting the email signature? **[If yes]** explain	❏ Yes ❏ No **Verbal Comments:**

5. Reply to an Email with Rich Text Formatting

Reply to an Email with Rich Text Formatting	
Moderator: Pretend you have received a business loan from the Small Business Administration.	

Moderator: Find the email from the Small Business Administration that has the terms of your loan and reply to it. Use the text we sent in zoom's chat window, but highlight, bold, and underline the money figures.
 	
My company has a projected profit of **$200,000** over two years. **$50,000** of this is from sales and **$150,000** is from consulting.
	Observation/Comments:
	Note any confusion, hesitations, or difficulties during the process.
	
	Time on task: _____ minutes
	
	❏ Locates email
	  ❏ Looks in *Focused* inbox
	  ❏ Searches for email using query
	❏ Replies to email
	  ❏ Clicks *Reply* arrow on top-right of email
	  ❏ Clicks *Reply* text at bottom of email
	❏ Bolds the text
	  ❏ Clicks the *Bold* icon and then types
	  ❏ Selects the text and then hits the *Bold* icon
	  ❏ Clicks command-B and then types the text
	  ❏ Selects the text and then clicks command-B
	  ❏ Selects the text and then selects *Bold* from the hover menu
	❏ Underlines the text
	  ❏ Selects the text and then hits the *Underline* icon
	  ❏ Selects the text and then clicks command-U
	  ❏ Selects the text and then selects *Underline* from the hover menu
	❏ Highlights the text
	  ❏ Selects the text and then hits the

	Highlight icon ❑ Selects the text and select *Highlight* from the hover menu ❑ Uses the *Format painter* ❑ Clicks *Send* ❑ Successfully performs reply task **Verbal Comments:**
Q: Did you successfully send an email? **[If yes]** How do you know that you successfully sent an email?	❑ Yes ❑ No **Verbal Comments:**
PROBE: Were you aware that there was a way to copy the text formatting and apply it to another bit of text using just one click? **[If yes]** Do you remember how you learned about that feature? **[If no]** If I told you the feature was called Format Painter, how would you expect it to work?	❑ Yes ❑ No **Verbal Comments:**
ERROR DEBRIEF **Q:** I noticed that when you did _____, the site indicated an error. Can you explain to me what happened there?	

6. Organize Account

Organize Account (Goal-Based)	
Moderator: This next activity requires some pretending. If your account has a large number of emails that aren't organized it will make it more difficult to do business. I'd like you to describe how you would organize the emails in your account.	
Moderator: Knowing that you will have a variety of emails in your account that deal with everything from contractors, subcontractors, meetings, manufacturing, etc, how would you organize these emails? There is no need to be detailed, I'd just like to know what features you would use. Feel free to click around if it helps you describe	**Observation/Comments:** • <u>Note any confusion, hesitations, or difficulties during the process.</u> • <u>Document path.</u> **Verbal Comments:**

your organization process.	
PROBE: Can you explain what Archive does in Outlook.com and when you would want to use it?	**A:** It's just another folder. You can use it for long term storage but does not have any special properties. ❑ Correct ❑ Incorrect **Verbal Comments:**
PROBE What is the difference between the Junk Email and Deleted Items folders?	**A:** Junk email runs automatic deletion every 10 days, while deleted items folder needs to be manually cleared. ❑ Correct ❑ Incorrect **Verbal Comments:**

7. Add Contacts

Add Contacts (Goal-Based)	
Moderator: You recently attended a business conference and some of the people you met sent you their business card as email attachments.	
Moderator: Find a way to store the details of these business cards for later.	**Observation/Comments:** Note any confusion, hesitations, or difficulties during the process. **Verbal Comments:**
Q: Rate your experience storing the business card in your email account on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**

8. Automatic Email Sorting

Automatic Email Sorting

Moderator: At that same business conference you signed up for a business tips newsletter. You would like to sort them to read later but get them out of your inbox so it doesn't become cluttered. It's a waste of your time to move the emails manually so you'd like to set up something to do it for you automatically.	
Moderator: Use rules to sort the current tip emails and all incoming tip emails automatically.	**Observation/Comments:** • Note any confusion, hesitations, or difficulties during the process. • Document path. **Verbal Comments:**
Q: Rate your experience setting up the emails to be automatically sorted on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**
PROBE: In your own words, can you explain what Sweep does?	**A:** It's a shortcut for creating a rule; it has a subset of the rule options. ❑ Correct ❑ Incorrect **Verbal Comments:**

9. Set an Away Message

Set an Away Message	
Moderator: You will be attending another conference this weekend and you won't want to reply to emails, but you also want people to know that you'll be unable to respond.	

Moderator: Set an away message letting people know that you will be out of the office this weekend (6/10-6/12) when they send you emails.	**Observation/Comments:**
	• Note any confusion, hesitations, or difficulties during the process.
	• Document path and any queries
	
	Time on task: _____ minutes
	
	❑ Clicks cog icon to open *Settings*
	    ❑ Searches in *Settings*
	    ❑ Clicks *View all Outlook settings*
	❑ Clicks *Mail*

	❑ Clicks *Automatic replies*
	❑ Clicks *Turn on automatic replies*
	❑ Clicks *Send replies only during a time period*
	❑ Enters a start time and end time
	❑ Enters a message
	❑ Clicks *Save*
	   ❑ Clicks X (Exit menu) before clicking save
	   ❑ Clicks *Save*
	
	❑ Successfully set an away message.
	
	Verbal Comments:

Q: Was there anything you struggled with or found difficult or confusing while setting the away message? **[If yes]** explain	❑ Yes ❑ No **Verbal Comments:**
Q: Rate your experience setting up the emails to be automatically sorted on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**

10. Create a Recurring Meeting Invite

Create a Recurring Meeting Invite	
Moderator: As part of your business is consulting, you have many meetings to attend.	

Moderator: For your next activity, set up a recurring meeting every Wednesday from 1:00-2:00pm with KMDS Labs.	**Observation/Comments:**
	• Note any confusion, hesitations, or difficulties during the process.
	• Document path
	
	Time on task: _____ minutes
	
	❑ Clicks calendar icon
	❑ Creates new calendar item
	   ❑ Clicks *New event*
	   ❑ Clicks day on calendar
	❑ Enters title
	❑ Enters start and end times
	❑ Clicks *Repeat*

	❑ Selects *Every week* ❑ Clicks *More options* ❑ Clicks *Invite attendees* ❑ Selects KMDS Labs ❑ Clicks *Send* ❑ Successfully created a recurring meeting invite. **Verbal Comments:**
Q: Was there anything you struggled with or found difficult or confusing while configuring the meeting invite? **[If yes]** explain	❑ Yes ❑ No **Verbal Comments:**
Q: Rate your experience making a recurring meeting invite on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**
Q: If you could change anything about the process of creating a meeting invite, for example the design, the content of the screen, instructions, etc. what would you change?	**Verbal Comments:**

11. Make and Modify an Agenda

Make and Modify an Agenda	
Moderator: As a successful business owner, you're frequently busy and must create agendas for yourself because there is no way you can remember everything you need to do. This agenda is essentially a list of things you want to complete over the next few days.	
Task 11A: Making an Agenda	
Moderator: For this activity I'd like you to create a new agenda with these three items: 1) prototype 2) code 3) phone call	**Observation/Comments:** • Note any confusion, hesitations, or difficulties during the process. [There are a couple variations to this task: they may make the agenda as a task and add steps to the task, or they might just email the list to themselves. They might even add it as a calendar event.]

	❏ Clicks *3 dot* icon on bottom left
	❏ Clicks *To Do*
	❏ Clicks *New list*
	❏ Enters list title
	❏ Enters tasks
	   ❏ Clicks Enter on keyboard
	   ❏ Clicks *Add*
	
	❏ Successfully created an agenda
	
	Verbal Comments:

Q: <mark>[If they did NOT create a task list]</mark> Were you aware that you could also create a task list? Do you know where to go to do that? **[If no]** What do you think would have helped you realize that you could create a task list?	❏ Yes ❏ No **Verbal Comments:**
Q: <mark>[If they did NOT create a note]</mark> Were you aware that you could also create notes? Do you know where to go to do that? **[If no]** What do you think would have helped you realize that you could create notes?	❏ Yes ❏ No **Verbal Comments:**

12. Receive email from a different account

Receive email from a different account
Moderator: You've recently realized it's too time consuming to jump between email accounts and you'd like to consolidate what you have so you only have to check one email. In this activity, you will import mail from your other account.

Moderator: Please use the account information to import and receive mail from that email address. [Give account information]	**Observation/Comments:** • Note any confusion, hesitations, or difficulties during the process. • Document path **Time on task**: _____ minutes ❏ Clicks *Settings* icon ❏ Uses *Search* to find where to go

	❑ Clicks *Mail*
	❑ Clicks *Sync Mail*
	❑ Clicks *Other email accounts*
	❑ Enters display name
	❑ Enters email
	❑ Enters password
	❑ Chooses import mail location
	   ❑ Selects default new folder setting
	   ❑ Selects existing folder option
	❑ Selects *manually configure* option
	❑ Clicks *OK*
	
	❑ Successfully imported email.
	
	Verbal Comments:

Q: Did you successfully import the email? **[If yes]** How do you know you successfully imported email?	❑ Yes ❑ No **Verbal Comments:**
Q: Rate your experience importing email on a scale of 1-7, with 1 being very hard and 7 being very easy. **[if low]** Explain	1=Very Hard 7=Very Easy **Verbal Comments:**
Q: If you could change anything about the import mail process, for example the design, the content of the screen, instructions, etc. what would you change?	**Verbal Comments:**

13. Difficulties Wrap-up <mark>[skip if no difficulties encountered]</mark>

Difficulties Wrap-up
Moderator: We're almost done! I'd just like to take a minute to recount some of the difficulties you experienced today using Outlook.com and get your input on how things could be improved.

[Navigate to an area that the participant had difficulty with. If there were many, begin with the biggest issues] **Q:** I noticed you had a particularly difficult time attempting to do ____. Why do you think that happened? What would improve	**Verbal Comments:**

your experience?	
[continue as needed]	**Verbal Comments:**

14. Final Impressions

Final Impressions	
Moderator: The last thing I'd like to do is to get your thoughts and feelings on the overall look of Outlook.com and how user-friendly you felt it was.	
Q: Overall, how easy or difficult was it for you to use Outlook.com?	**Verbal Comments:**
Q: On a scale of 1-7, how visually appealing would you rate Outlook.com, with 1 being not at all appealing and 7 being very appealing? **[if low]** Explain	1=Not at all appealing 7=Very Appealing **Verbal Comments:**
Q: Based on what you've seen, how acceptable on a scale of 1-7, with 1 being not acceptable and 7 being very acceptable, is the current number of ads? **[if low]** Explain	1=Not acceptable 7=Very Acceptable **Verbal Comments:**
Q: What did you LIKE about Outlook.com?	**Verbal Comments:**
Q: What did you DISLIKE about Outlook.com?	**Verbal Comments:**
[Skip these for Outlook.com users]	
Q: Did Outlook.com act as expected or did it surprise you today?	**Verbal Comments:**
Q: How does Outlook.com compare to your current primary email provider?	**Verbal Comments:**
PROBE: Did you feel like Outlook.com had the same features as your current primary	❏ Yes ❏ No **Verbal Comments:**

email provider? Why or why not?	
Q: Would you consider using Outlook.com instead of your primary email provider? Why or why not? **[If no, ask follow ups]**	❑ Yes ❑ No **Verbal Comments:**
[End skipped questions]	

Q: After having used Outlook.com, how interested are you in the Premium version on a scale of 1-7, where 1 is not at all interested and 7 is very interested? As a reminder, these are the Premium features
  ● Ad-Free interface
  ● Custom domains
  ● Enhanced/advanced
  ● Full desktop version of Office
  ● Latest versions of Word, Excel, and PowerPoint
  ● 1 TB of cloud storage
 	
[If low, follow up]
	1=Not at all interested 7=Very Interested
	
	Verbal Comments:

Q: Is there anything else you would like us to know?	**Verbal Comments:**

Appendix G: Checklist

This section contains a list of items that the researchers need to ensure are available and set up properly while conducting the usability test.

Before the participants arrive

☐	Send a reminder email to participants two days prior to the study session
☐	Call the participants and confirm their arrival
☐	Make sure there is enough space in the external hard drive (AV Room)
☐	Make sure the hard drive is labeled with the date and study name (AV Room)
☐	Make sure the camera system is working properly (Test Room and AV Room)
☐	Make sure the audio system is working properly (Test Room and AV Room)
☐	Ensure desktop computer has Mac OS 10.14 installed (Test Room)
☐	Ensure desktop computer has Parallels 15 installed (Test Room)
☐	Ensure desktop computer has Windows 10 installed in Parallels partition (Test Room)
☐	Ensure desktop computer has latest version of Chrome installed and browser history, cookies, and cache have been cleared (Test Room)
☐	Ensure desktop computer has latest version of Edge installed and browser history, cookies, and cache have been cleared (Test Room)
☐	Ensure desktop computer has latest version of Safari installed and browser history, cookies, and cache have been cleared (Test Room)
☐	Ensure desktop computer has latest version of Firefox installed and browser history, cookies, and cache have been cleared (Test Room)
☐	Make sure the desktop computer has internet access (Test Room)
☐	Make sure the desktop computer has images trip.jpg and graph.jpg on the desktop (Test Room)
☐	Confirm the proper study protocol has been selected
☐	Ensure the office printer has paper and ink (Reception)
☐	Prepare the task sheets

☐	Arrange test room as per diagram
☐	Ensure task cards and props (business cards) are in the Test Room
☐	Keep the water and refreshments ready and sufficiently available (Reception)
☐	Conduct a team meeting to ensure everyone is on the same page

When participants arrive

☐	Receptionist takes ID to confirm participant identity and has them sign in
☐	Receptionist prints and explains consent form to participant
☐	Receptionist collects and files consent form
☐	Begin recording

During the session

☐	Moderator introduces themself and reads session introduction
☐	Follow the study process
☐	Keep recording until the participant leaves the room

After the session

☐	Stop recording
☐	Pay participant $100 in cash (Reception)
☐	Make sure the recording is saved and named properly on the AV Controller's computer
☐	Place the external hard drive backup in the locked cabinets
☐	Backup recording to the cloud
☐	Conduct team meetings and discuss

Appendix H: Task Sheets

Average Users

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1. **Read through the Outlook.com marketing page.**

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2. **Register a new account on Outlook.com. Say "done" when you are finished.**

---

3. **Set up your new email account however you'd like. Say out loud what you are trying to accomplish when you begin each customization. Say "done" when you are finished.**

---

4. **Add a permanent message to the bottom of all of your emails that says "Sent from my iPhone."**

4A.**Write to us about your upcoming trip and include the image you'll find on the desktop *trip.jpg*. Our email is kmdslabs@outlook.com.**

5B.**Pick an email and remove it.**

5C.**Pretend you won free tickets to Disney World! Find this email and reply back with:**

Thanks! (in bolded letters) 👍(thumbs up emoticon)

6C. Find the email containing your departure plane ticket information (from San Jose Airport) for your upcoming trip. Then file this email with your other flight emails to make it easier to quickly access.

7C. Find a way to store the business card for later using your email account. Let us know what you're doing by saying it out loud!

8C. Mark your calendar for your trip to Florida, which is from June 10th to June 20th.

9A. Create a new shopping list. It should have a name and these three items:
1) sunblock
2) bathing suit
3) hat

9B. Mark off one of the items in your shopping list as being done.

10A. Jot down somewhere that you need to contact the travel agent tomorrow.

10B. Remove what you just created.

11. Set an away message for your vacation, so that when people email you they get an "Out of the office" response. This should be set for 6/10-6/20.

Power Users

Non-Outlook.com Users

> 1. **Read through the Outlook.com marketing page.**

Outlook.com Users

> 1. **Log in to your own Outlook.com account and walk through your setup.**

> 2. **Login to Outlook.com using this account information:**
>   Username: kmdstest@outlook.com
>   Password: CX575L4B95!

> 3. **Set up this email account however you'd like. Say out loud what you are trying to accomplish when you begin each customization. Say "done" when you are finished.**

> 4. **Add a permanent message to the bottom of all of your emails that says "Sent from my iPhone."**

> 5. **Find the email from the Small Business Administration that has the terms of your loan and reply to it. Use the following message, formatted exactly the same way, and include the image *graph.jpg* that you'll find on the desktop.**
>
>   My company has a projected profit of **$200,000** over two years. **$50,000** of this is from sales and **$150,000** is from consulting.

> 6. **Organize your email. Say out loud what you're planning on doing.**

7. Find a way to store these business cards for later using your email account. Say out loud what you're planning on doing.

8. Use rules to sort the current tip emails and all incoming tip emails automatically.

9. Set an away message letting people know that you will be out of the office that weekend (6/10-6/12) when they send you an email.

10. Set up a recurring meeting every Wednesday from 1:00-2:00pm with KMDS Labs.

11A. create a new agenda with these three items:
1) finish prototype
2) email programmers
3) schedule phone call

11B. Mark off one of the items in your agenda as being finished.

12A. Jot down somewhere that your prototype password is 123

12B. Remove what you just created.

13. Use this account information to import and receive mail from that email address.
Username: KMDStest123@gmail.com
Password: H559KM312!