balfour®

Research Plan 2017

Balfour UX Research Proposal

Optimizing UX research over the long term will give Balfour a distinct competitive advantage. By studying what our users are already doing and discovering what they need, we can produce higher performing products. A *Customer First* design begins with user centered research that helps the company discover where the business needs and our user needs overlap. This process begins with user testing, which we have already begun practicing in Publishing.

We propose a research program that will allow the company to decrease time to market products. According to Forrester, Indeed, and IEEE, 70% of failed software programs cite ineffective user adoption and experiences as the key issue related to their failure. By implementing a user centered research and design approach, Balfour will be able to generate the highest quality products with a shortened delivery period. We will also be able to succeed over time by creating products that sustaining over time and have a level of integrity. This is the key to success in a fast moving technological economy that will allow Balfour to become digitally sustainable.

Reasons to Increase Investment in time and resources into Research:

- **Saves Money:** Evaluative Research prior to development decreases the amount of rework required during and after production. Between 47% and 66% of development time is spent reworking feature code. (source: Bossert)
- **Improves Decision Making:** Generative Research (Ideation) helps define new needs and desires of the users. This informs leadership, stakeholders, and designers and thereby improving decision making and prioritization of tasks for development and design backlogs.
- **Competitive Advantage:** Good UX research and design increases brand loyalty and brand quality by implementing products far in advance of our competitors.
- **Focus:** Focusing on customer needs early increases ROI while, at the same time, decreasing risk by 33% - 50%. (source: MITX)

Balfour UX Research: Sketch, Test, Repeat

Balfour currently has multiple projects in development. In order to test, iterate and improve the current designs of **BalfourPages, BalfourTools**, **ImageShare**, and **StudioBalfour**, the UX team proposes a series of tests to be conducted each year.

Beginning this spring and through the end of the summer, there will be several regional Balfour Workshops and Events, including the JEA annual conference on April 6-9, where the UX team can utilize student and adviser participants to engage in UX testing.

Research Schedule for 2017:

DATE	LOCATION	REGION	SALES REP	PRODUCT	PARTICIPANTS	METHODOLOGY	TEAM
May	LOCAL (TBD: Amanda)	4	(TBD RE: Amanda's contacts)	ImageShare	Students	User Journey Generative	Jen Joey Zach
June	TBD	TBD	Launch Lab/DFW Region	MyYear	Students/Advisers	Generative	Jen Joey Zach Vicky
June 9-11	Chicago, IL	1	Brad Nemsick	BalfourPages: Photo Organization, Tagging, & Coverage Reporting	Students Advisers	Stakeholder Interviews RITE	Jen Zach
June 19-21	Orlando, FL	3	Steve Ferguson	BalfourPages Proof & Submission, Page Design & Collaboration	Advisers Students	RITE Study	Joey Jen Vicky
June 26-28	Olathe, KS	1	Whitney Baker	BalfourTools Menu Organization	Advisers	Generative Study Survey RITE	Jen Zach
June 27-29	Phoenix, AZ	5	Susan Fearnside	BalfourPages Indexing & Coverage Reporting	Students	Generative Study Stakeholder Interviews	Joey Vicky
July 14-17	Grapevine, TX	N/A	Contact: Gaylene Mabry	BalfourPages: Book Set up & Style Management: Templates, Assignments, & Grading	Advisers	Generative Stakeholder Interviews RITE	Jen Joey Vicky Zach Cat
July 20-23	Harrisonburg VA	2	Tami & Scott	StudioBalfour: Communication Center, Dashboard & Widgets	Advisers	Generative Stakeholder Interviews RITE	Joey Vicky
July 21-24	College Station, TX	4	Dee Moore	BalfourPages: Editor, Organization, , Student Collaboration and Submission process	Advisers Students	Stakeholder Interviews RITE	Jen Zach
July 24-27	Malibu, CA	5	Corey Mundwiler	SB: Store Set up, Manager, Sales Reporting	Students	Usability Study RITE	Joey Vicky
July 27-29	Denver, CO	1	Rob Rathbun	BalfourPages Book Style & Management	Students	RITE Study	Jen Zach

BalfourPages Release 2017

The release of BalfourPages this fall will be the first of many new and updated products designed in Balfour's Launch Lab. With the reimagining of the Balfour brand, we envision our product releases as seamless user experiences. Beginning this spring, the team will begin rolling out a series of quantitative and qualitative methodologies that will help us generate data about the usability of the new design.

In order to have a successful release of the product, the team is proposing the following agenda:

A series of UX studies to iterate on the original designs to be conducted at Balfour Regional workshops throughout the spring and summer:

RITE (Rapid Iterative Testing and Evaluation) study on Portrait flowing (competed at JEA)
1. Usability-Lab Study on Photos: Organizing, Tagging, Coverage Reporting
2. RITE study on Page Design: Editor, Templates, Organization
3. RITE Study on Book Set up & Style Management: Templates, Assignments, Organization
4. RITE study on Book Editor, Organization, Page/Spread Creation, Student Collaboration, and Submission process
5. RITE Study: Book Style & Management
6. RITE study on Indexing & Coverage Reporting

ImageShare

Image share needs to be tested on users in order to understand how users are currently engaging with the product and to determine how best to iterate on the current design. There are several concerns with the product that need to be resolved. The team will conduct a generative study on-site in the Launch Lab with current and potential users to determine a course of action for implementing new features into the product.

StudioBalfour

During the summer research season, the team will conduct two studies on the website. This will include: surveys, affinity diagraming and generative research. The results of this testing will help the UX team understand exactly what our users need in terms of student data, coverage reporting, and metrics.

BalfourTools

The team will conduct two studies on this product: a usability study and a generative study. We will investigate the design of BalfourTools and determine how best to iterate on its current features. Research and the design process will be completed by this fall and should be ready for development by January.

1) BalfourPages Photos: Organizing, Tagging, Coverage Reporting

DATE:
June 9-11, 2017

LOCATION:
St Xavier University
Chicago, IL
Brad Nemsick

Strategy:
The team will study how students engage with the editor and how they intuitively manage photos. We will conduct a usability-lab study, which will allow us to have a better understanding of what features are the most important to students, how students are intuitively engaging with the application, and determine how best to iterate on the current design. Sessions will be recorded and users will be encouraged to discuss their thoughts during the session. This process will allow us to discover any pain points and correct those issues in development.

Goal:
Our goal is to see how intuitive the photo management system is to students. If we discover any pain points, we will iterate on the design in order to correct those issues in the development process.

Research Questions:
- How are users tagging photos?
- How are users organizing photos?
- Is the design intuitive?
- What features would users like to see implemented?

Methodology:
A usability lab study will be conducted and recorded during the workshop. We will encourage the participants to discuss their reasoning throughout the session. This method allows the research team to watch users engage with the product and determine its intuitiveness, productiveness and to see any possible breakdowns.

Entrance/Exit surveys will be conducted.

Participants:
- Students

Recruiting Criteria:
- Students who are familiar with organizing photos in a yearbook editor.

Schedule:
May 2017: Conduct UX testing
Summer 2017: Iterate on current design

TESTING PHASE	TIME ALLOTTED
1. Welcome, non-disclosure, consent forms.	5 minutes
2. Pre-test survey on usability.	5 minutes
3. Product testing via think-aloud protocol. Screen capture video	20 minutes
4. Post testing survey and reflection	5 minutes
5. Exit interview	10 minutes

2) BalfourPages: RITE study on Page Design: Editor, Templates, Organization

DATE:
June 19-21, 2017

LOCATION:
Florida Yearbook Seminar, Orlando, FL
Embassy Suites Lake Buena Vista
Steve Ferguson (727) 488-FERG

STRATEGY:
The team will conduct a RITE/usability study on both advisers and students in order to test new features of BalfourPages' Proof and Submission process. We will record users as they interact with the application while asking them questions about their experience during the process. If they find any issues, or have any blocks, we will then iterate on the design for development.

GOAL:
The goal of this study will be to understand how students intuit page design, collaboration, and submission and determine whether or not we need to adjust the design in development.

METHODOLOGY:
RITE Study & Usability Study

PARTICIPANTS:
Advisers
Students

RESEARCH QUESTIONS:
- Is the process intuitive?
- Does the process make sense to users?
- How are advisers responding to the new student submission/grading features?
- How do students engage with the new collaborative ability, proofing and submission methods?
- Does the new design meet the needs of all users?

SCHEDULE:
June 2017: Conduct UX testing
Summer 2017: Iterate on current design
Fall 2017: Development

3) BalfourPages: RITE Study on Book Set up & Style Management: Templates, Assignments, & Organizing

Date:
July 14-17, 2017

Location:
Adviser Workshop, Grapevine, TX
Hilton DFW Lakes Executive Conference Center

Strategy:
The UX team will conduct a series of interviews and a generative study with advisers. We will observe how they interact with the new the book setup wizard, page templates and the ability to assign spreads to students. These sessions will be recorded and advisers will be interviewed before and after the session to discover any issues or blocks that might exist. Upon completion of this study, we will then determine if the team needs to iterate on the current design and submit changes to development prior to the fall release.

Goal: Test the application in order to determine best iterations on the current design prior to the fall Pilot Study release.

Methodology:
Generative study
Stakeholder interviews

Participants:
Advisers

RESEARCH QUESTIONS:
- How are advisers responding to the book set up wizard?
- Templates: What do advisers need? Do we need to add more templates prior to release?
- What are advisers saying about the ability to assign spreads, student collaboration and submission process? Are there any blocks in the process? Is there anything we need to adjust prior to release?
- How are advisers responding to the way we have organized assignments, the ability to grade spreads, and page submission?
- Are there any blocks in the current design?

SCHEDULE:
July 2017: Conduct UX testing
Late Summer 2017: Iterate on current design
Fall 2017: Development

4) BalfourPages: Book Editor, Organization, Page/Spread Creation, Student Collaboration and Submission process

DATE:
July 21-24, 2017

LOCATION:
TX A&M University
College Station, TX
Dee Moore

STRATEGY:
The team will conduct a Usability study with students in order to determine how well the new book organization and management capabilities are functioning. We will specifically target how the student's interact with the new editor, its collaborative ability, how the new desktop features help them manage their spreads and deadlines, and how they engage overall with these functionalities.

GOAL: To determine how well users understand how to:
- Layout a page
- Use the Editor
- Collaborate with classmates
- Submit completed pages/spreads

METHODOLOGY:
RITE/Usability Study

PARTICIPANTS:
Students

RESEARCH QUESTIONS:
- Do students recognize icons in the editor?
- How intuitive is the application?
- How are students responding to the ability to collaborate, new student submission/grading features?
- Are there any blocks in the current design?

SCHEDULE:
July 2017: Conduct UX testing
Late Summer 2017: Iterate on current design
Fall 2017: Development
2018: Release

5) BalfourPages: Book Style & Management

DATE:
July 27-29, 2017

LOCATION:
Denver, Co
Rob Rathbun

STRATEGY:
The team will study the manner in which students and advisers experience indexing and coverage reporting in the application.

GOAL:
Conduct a RITE/Usability study with advisers and students to determine how well these features function and if the team needs to iterate on the current designs.

METHODOLOGY:
RITE Study/Usability Study
Interviews

PARTICIPANTS:
Advisers
Students

RESEARCH QUESTIONS:
- How are users interacting with the indexing system?
- Is the new product's indexing system intuitive?
- Are users discovering any blocks or issues with BP indexing?
- Do you use any of the sales management tools in StudioBalfour?
- How do you use these tools?

SCHEDULE:
July 2017: Conduct UX testing
August 2017: Iterate on new designs
Fall 2017: Development

6) BalfourPages: Indexing & Coverage Reporting

DATE:
June 27-29, 2017

LOCATION:
Phoenix, AZ
Susan Fearnside

STRATEGY:
The team will study the manner in which students and advisers manage indexing and coverage reporting.

GOAL:
Conduct a RITE/Usability study with advisers and students to determine how well these features function and if the team needs to iterate on the current designs.

METHODOLOGY:
RITE Study/Usability Study
Interviews

PARTICIPANTS:
Advisers
Students

RESEARCH QUESTIONS:
- How are users interacting with the indexing system?
- Is the new product's indexing system intuitive?
- Are users discovering any blocks or issues with BP indexing?
- Do you use any of the sales management tools in StudioBalfour?
- How do you use these tools?

SCHEDULE:
July 2017: Conduct UX testing
August 2017: Iterate on new designs

StudioBalfour: Year-long User Study

DATE:
TBD

LOCATION:
Launch Lab

GOAL:
Discover what a complete user journey might look like for a group of users including: Internal users, students, advisers, and parents.

STRATEGY:
Use a card sorting technique to determine core user data. This will lead to the discovery of an overall user journey from beginning to end for a complete user persona.

METHODOLOGY:
Card Sorting
Interviews
Surveys

PARTICIPANTS:
Internal: CSR, AE, Sales Rep, Tech Support
External: Students, Advisers, Parents

RESEARCH QUESTIONS:
- What does a complete user journey look like?
- What is the experience of our users?
- How are our users feeling about the overall Balfour experience throughout the year?
- Are there certain points during the yearbook creation/purchase, regalia, ring, etc purchase throughout the year where a user has a better experience than at other times?
- What are the real pain points they are experiencing throughout the year?

SCHEDULE:
TBD

StudioBalfour: Store Setup, Student Manager, & Sales Reporting

DATE:
July 24-27, 2017

LOCATION:
Ignite Yearbook University, Malibu, CA
Pepperdine University
Corey Mundwiler (323) 823-0565

STRATEGY:
The team will conduct a usability study with students in order to determine what our users need and what features we can create to update the product.

GOAL:
The team will conduct a usability study and a survey to help the team discover what features and functionalities we need to add to the application.

METHODOLOGY:
Usability Study

PARTICIPANTS:
Students

RESEARCH QUESTIONS:
- What capabilities do our users need that the product does not currently offer?
- What can we do differently with the product in order to stand out from our competitors?
- What are the usage patterns of the product with different school personas?
- What do users want the product to do differently?
- What problems are users experiencing?
- Where does the product fail to meet expectations?

SCHEDULE:
July 2017:   UX Testing x2
Aug 2017:   ReDesign

ImageShare

DATE:
May 16-17, 2017

LOCATION:
TBD: Local (Re: Amanda)

STRATEGY:
The Design Team will conduct a usability study as well as a survey in order to determine how users are currently engaging with the product, and what the application needs in order to have better functionality. This study will be conducted over a 2 day period at 2 schools in order to gain a wider perspective of users.

GOAL:
The team will discover what users need and how they want the application to function so that we can iterate on the current design.

METHODOLOGY:
Generative research:
- Survey
- Usability testing
- Usage reports and Analytics
- Affinity diagraming

PARTICIPANTS:
Students
Advisers

RESEARCH QUESTIONS:
- What problems are users having with the login process?
- What security features does the product need?
- Are there features that users need that the product does not currently offer?
- What are the unmet needs of our users?
- Do we want/need a social media link/login?
- Do we need access to Balfour store – the ability to order a yearbook? The ability to create your own pages?
- Does the app need notifications?
- How should advisers use the app?
- How should advisers manage the images and files?
- What would be the easiest way for you to log in?
- How would you be able to find your school?
- What would be the easiest way to upload images?

- How do you want to organize the images?

SCHEDULE:
May 2017: Conduct UX testing
May 2017: Design
June 2017: Development

StudioBalfour: Communications Center, Dashboard & Widgets

DATE:
July 20-23, 2017

LOCATION:
Virginia Yearbook Camp, Harrisonburn, VA
James Madison University
Tami & Scott Stalcup (434) 989-8316

STRATEGY:
Conduct interviews and testing with Advisers to determine how they manage and organize data, which reports are necessary and vital, and discover what they need in order to be more productive.

GOAL:
Our goal is to work with advisers to determine what their data needs are so that we can create the most effective system for managing it.

METHODOLOGY:
Generative research:
- Survey
- Usage reports and Analytics
- Affinity diagraming

PARTICIPANTS:
Advisers

PROTOTYPES:
We will use high fidelity clickable mockups in an Invision board. Mockups will be iterated upon during the study.

RESEARCH QUESTIONS:
- How do you manage student data?
- What data is the most important to you?
- How would you prefer to manage this data?
- How often do you view sales data?

SCHEDULE:
June 2017: Conduct UX testing
Summer 2017: Design process
Fall 2017: Development

StudioBalfour & BalfourTools: Menu Organization

DATE:
June 26-28, 2017

LOCATION:
MidAmerica Nazarene University
Olathe, KS
Whitney Baker

STRATEGY:
Interview advisers and conduct surveys as well as a usability study to determine the best strategy for organizing student data and sales reporting.

GOAL:
Discover the needs of users in an effort to optimize capability of the databases.

METHODOLOGY:
1. Conduct user interviews & surveys.
2. Conduct competitive research
3. **Generative Research: 2 Studies**
   - Student Data
   - Coverage Reporting

PARTICIPANTS:
Advisers

RESEARCH QUESTIONS:
- What are the unmet needs of our users?
- What do users need?
- What do users want the product to do?
- What are the products most important features for users?
- What problems are users experiencing?
- Where does the product fail to meet expectations?

SCHEDULE:
March 2017: Research planning
June 2017: Conduct UX testing
July-August 2017: Redesign

MyYear

DATE:
June 2017

LOCATION:
Launch Lab/DFW Region

Strategy:
Engage users to participate in a generative study and ideation in order to generate UX solutions for the current product.

Goal:
Interview and collaborate with users in order to discover pain points and what's possible for future designs.

Research Questions:
- What would you like to see MyYear do that it currently does not?
- What features would you like to see?
- Are there any pain points?

Methodology:
- Interviews
- Journey Mapping
- Entrance/Exit surveys

Participants:
- Students
- Advisers

Recruiting Criteria:
- MyYear customers