

# Usability Test

RE/MAX

## Business Problem

The MAX/Center product team is determining what improvements it can make to the referral form to better support brokers, agents, and other franchisee staff. One of the goals of MAX/Center is to connect real estate agents and brokers so they can refer business leads to each other. This boosts their business and generates additional income for RE/MAX. Currently, most agents and brokers avoid using the MAX/Center referral form due to its length and the lack of awareness of the feature. The product team would like to find a way to improve the how agents and brokers refer business to each in MAX/Center. This effort will be considered a success if the number of referrals sent within MAX/Center increases.

## Summary

The user experience design team is conducting moderated, qualitative usability test to understand how agents and brokers currently use the form and any challenges they're experiencing. The test should take 15 - 30 minutes.

## Primary Goals

- Understand if agents and brokers can easily navigate to the referral form and how they typically do it.
- Understand what is confusing and what is straightforward about the layout and graphic design of the form.
- Understand what is easy or challenging about filling out the form.
- Understand what agents and brokers expect will happen after they submit the form.

## Methodology

**Location:** Zoom video conference

**Interview Roles:** 1 moderator, 1 participant, and optional observers

**Rationale:** Moderated, qualitative usability tests help the design team observe customers using the form and allow them to ask follow-up questions to clarify why they're performing certain actions and what assumptions they're making.

## Research Method Capabilities and Limitations

The primary limitation of moderated usability testing is time constraints. As a small design team, the number of sessions the we can conduct is small. Luckily five participants is enough to discover most usability problems in a product. Results from usability tests conducted with a small sample size aren't large enough to draw conclusions about the total user base.

## Target Participant Pool

- Agents (3-4)
- Franchise Staff (3-4)

## Script

*[Enable screen sharing for research participant.]*

I'd like to test a couple things to make sure we can conduct the session. First, can you share your screen?

*[See if participant can share screen in Zoom.]*

Next, can you make certain you can log into MAX/Center?

*[Wait for participant to log into MAX/Center.]*

And before we begin, I'd like to get your permission to record this feedback session. The purpose of this is to reduce the need for me to take notes and help me focus on our conversation. The recording would only be shared internally with people on working on this project. *[Also, we have a few people from the product team observing this session on the call.]* Do we have your permission to record?

Thank you.

Before we start, I have some information for you. I'm going to read it to make certain I cover everything.

You probably already have a good idea of why we asked you here, but let me go over it again briefly. We're asking members of our network to try using the MAX/Center referral feature that we're working on so we can see whether it works as intended. The session should take about 15 - 30 minutes.

The first thing I want to make clear right away is that we're testing the *site*, not you. You can't do anything wrong here. In fact, this is probably the one place today where you don't have to worry about making mistakes.

As you use the site, I'm going to ask you as much as possible to try to think out loud: to say what you're looking at, what you're trying to do, and what you're thinking. This will be a big help to us.

Also, please don't worry that you're going to hurt our feelings. We're doing this to improve the site, so we need to hear your honest reactions.

If you have any questions as we go along, just ask them. I may not be able to answer them right away, since we're interested in how people do when they don't have someone sitting next to them to help. But if you still have any questions when we're done, I'll try to answer them then. And if you need to take a break at any point, just let me know.

Do you have any questions so far?

### **Intro Questions**

Okay. Before we look at the site, I'd like to ask you a few background questions.

- What's your role at your office? What does a typical day look like for you?
- How much of your work requires you to use MAX/Center?

### **Tasks**

*[Ask participant to share their screen.]*

Thanks. Now I'm going to ask you to try doing some specific tasks. I'm going to read each one out loud and give you a written copy in the Zoom chat.

And again, as much as possible, it will help us if you can try to think out loud as you go along.

1. You've recently met a local homebuyer who wants to buy a house in a neighboring state. Using MAX/Center, connect with a RE/MAX agent or broker in the neighboring state to share this lead with them.
  - *[When the participant finds a profile to send a referral to, direct them to find your own corporate employee profile.]*

### **Follow-Up Questions**

2. Before this session, had you shared a lead with a RE/MAX agent or broker this way?
3. How do you typically share leads with real estate agents?
4. How many leads have you received from other RE/MAX network members so far this year?
5. How many leads have you given shared with other RE/MAX network members so far this year?

### **Participant Questions**

*[Ask participant what questions they have.]*

### **Observer Questions (Optional)**

Ask any follow-up questions from observers.

### **Conclusion**

Thank you for taking the time to share your feedback with us. We appreciate your being a part of the RE/MAX network.