

Project 2: Formal Usability Proposal

I. Overview

Here's your **rhetorical situation** for this project:

You and your group members are working for a small, independent website testing and reporting firm. Your job consists mainly of helping clients (e.g. commercial companies, non-profit organizations, schools, agencies, etc.) who run their own websites maximize their efficiency and profits. You accomplish this by designing and implementing Usability Tests that ask their web users questions about your clients' sites to see how they can better appeal to their viewers and consumers. You ask about things such as ease of navigation, customer service, distraction of pop-up ads, color scheme, safety, layout effectiveness, etc. You then gather up the users' answers, compile them into meaningful statistics, and make recommendations to your clients about how they can change and improve their websites.

For example, your company may have written a report like the one produced for Tower Records. (See class website, Handouts page. While you are there, please also review Usability Testers' pitches from Web Mistress and UC Web's Scorecards.)

Today, your supervisor has received a letter like this one:

To: Website Usability Agencies
From: Some Kinda Corporation
Date: [insert date of assignment]
Subject: Request for Proposals

Dear Colleagues:

Some Kinda Corporation is soliciting the contract hiring of a Usability Testing firm to assist our Web department in updating and improving our existing customer-oriented website. Our website is designed to:

- assist customers in making easy and safe on-line purchases
- facilitate "browsing" merchandise available in our stores
- locating stores and contact information;
- provide immediate customer feedback to our stores and/or corporate offices
- promote Some Kinda Corporation through commercial advertisements
- highlight Some Kinda Corporation's commitment to community service and good will

Our goal for this request for proposals is to locate and hire the firm that best suits our needs as we assess our current web layout and content, exploring revisions and improvements. We seek a Usability Testing firm who conducts research with web users from a broad spectrum of backgrounds and at all levels of cyber-sophistication. We hope to determine what specific aspects of our website are in most need of immediate revision/change.

We request the following action from any Usability Testing firm interested in commissioning this project:

Please submit a formal letter of interest. We will contact you if we are interested in your initial ideas and personnel and will ask that you submit a detailed project proposal in conjunction with a presentation.

Please send your letter of inquiry/interest to:

Media Relations
Some Kinda Corporation
123 Corporate Plaza
St. Paul, MN 55412

We look forward to hearing from you.

Sincerely,

Some Kinda Corporation

Your company, of course, wants this job, and your supervisor has assigned your group the task of applying for and securing the commission of this project.

How, exactly, will you get this job? I'm glad you asked.

The first thing your group will do is choose your own client. I want you to find an organization's website that you want to analyze and work to improve. You can choose a school, corporation, government branch, non-profit, etc. Find a client and website that you are interested in working with over the next nine weeks.

This project does not ask your group to conduct an actual Usability Test on your chosen client's website; nor does it ask you to write a final Usability Report. Rather, you are applying for the job of conducting a Usability Test for your client. However, in order to secure the job in the first place, you will have to carefully plan a mini -Usability Test of your client's website, project the results and benefits of the Usability Test, then present your plan to your client. In the context of this project, you are competing with several other Usability Testing firms for this particular job, so you must be thorough and detailed in your proposal.

Think about the scope of this project as analogous to an interior design job (work with me here). In order to commission the job of designing a room, a designer must go through the entire process of choosing paint colors, selecting furniture, coordinating fabrics—basically, the designer will completely plan the project, then present that design to the homeowner—all just to get permission to then actually do the job.

Your purpose here is roughly the same: convince your client that you are qualified, prepared, and eager to take on this job. You will achieve this purpose by planning out in detail exactly how you will conduct testing, analyze data, and predict the results and benefits of the testing.

II. Purpose

Document Genres: **Genre** is defined as a "type, style, or category used to classify." This project will allow us to produce several different kinds of document genres. Each type of document comes with its own style and formatting requirements, which will be important to know before altering. We will consider different genre purposes, contexts, and requirements. And of course, we will consider how style and

grammar can help you persuade your reader and construct your ethos. Here are the types of documents we will consider:

- Letters of Inquiry/Interest
- Email
- Memos
- Progress Reports
- Follow-up Letters
- Surveys & Usability Tests
- Formal Proposals
- Presentations
- And more....

Collaborative Writing: Yes, it's group work. And it's important for us to complete this project in groups for several reasons. One, this is real-world stuff you have to do, so we might as well do it here, but not just for the sake of doing it: I want us to be able to have discussions about taking on roles, dividing work, and composing in groups rather than individually. Two, I hope working in groups will allow you to develop your writing in a way that you can't when working alone. Part of writing well is learning to contribute to the drafting of a document in a group, learning to brainstorm, adapting to the give and take of ideas, editing others' work and allowing your work to be edited. Lastly, this is a big project with numerous requirements that will be feasible only if the work is fairly divided.

Audience Analysis: You have two different audiences to consider (Ok, three, counting your instructor): 1) your client; and 2) your client's website users. You are trying to appeal to both, but not necessarily at the same time, and definitely not in the same ways. Your client is your **primary audience** – the first group whose needs should be evaluated and how to appeal to those needs should be considered. But your *primary audience has its own audience* to be concerned about: a diverse group of website users; those users are your **secondary audience**. We will spend time discussing and writing about how you will consider both audiences in your writing.

III. Requirements

In order to successfully complete this project, you need to:

- Organize your group; establish each member's role; and set group goals
- Plan and write your project collaboratively
- Thoroughly research and analyze your client corporation and its existing website
- Find organizations similar to your clients and see what their websites look like
- Analyze your client's *audience's* needs
- Write persuasively and informatively
- Know what Usability Testing is and how it works
- Plan, write, and *test* a Usability Test
- Be able to produce projected results of your Usability Test
- Compile all parts of a Proposal into an organized, coherent document
- Professionally present your final product to your client

IV. Deliverables

1. Formal Project Proposal –

What exactly is a formal proposal? See– Guffey Text (Ch. 10, 11, 14,); The Rhetoric of Proposals (CR:63-68); Building Arguments (CR: 69-78) and various resources posted on class website

Below, I have listed all the required sections for your Formal Proposal. However, I have not included what information needs to be presented in each section; rather, I have posed several questions that get at the **required purposes** of each section.

You may organize your proposal however you wish, and in whatever manner you feel is most logical and persuasive.

I. Heading

- Does the heading contain all relevant and necessary contact and title information?
- Does the heading conform to report and proposal writing standards?

II. Overview

- Does the client have a clear and concise understanding of the entire report?
- Does it immediately grab the client's attention?
- Does the client know the benefits of this proposal?
- Are the client's needs considered?
- Does the client know what to expect from the actual project?
- Does the client know what you need to complete this project?
- Does the client know what deliverables you will produce?

III. Background

- Does your primary and secondary research enhance your credibility?
- Does your primary and secondary research provide evidence that your plan will work?
- Do you demonstrate to the client that you have a thorough understanding of the client's business and needs?

IV. Plan

- Does the client have a thorough draft of your mini-Usability Test?
- Does the client understand your methods of evaluation?
- Does the client trust your group to conduct the tests and analyze data?
- Does the client understand how long this project will take to complete?
- Do you clearly show how you will proceed in addressing the client's/web user's needs?
- Do you justify your methods as the most effective and appropriate for this project?
 - Have you acknowledged dissenting views on the efficacy of Usability Testing?
- Does the client know how long it will take to complete the project and is it the timeline reasonable?
- Is the client forewarned of any possible problems in completing the project?

- Are these problems presented in a way that minimizes their risk, reassuring the client that the project is worth these risks?
- Is there enough detail to convince the client?

V. Supplies, materials, and equipment

- Does the client know what you need and how you will acquire what you need?
- Is the client made aware of why you need these supplies?
- Does the client have a detailed budget, complete with a schedule of dates for which you require funds disbursements?

VI. Personnel

- Are all group members qualified to complete this project?
 - Have you provided résumés for all group members?
- Do all group members have unique and valuable contributions to make to this project?
- Is the presence of each group member beneficial and necessary?

VII. Expected Results and Benefits

- Does this section demonstrate to the client that you have a vision of this project from beginning to end?
- Are your expected results viable and reasonable?
- Do you clearly articulate the various benefits of your project (financial, corporate, customer)?
- Are the results of this project going to be worth the costs and risks?
- Do you convey a tone of appreciation, willingness to help, and availability?

VIII. Appendices

- Do the documents included here add to your credibility as Usability Testers?
- Is all the information in this section relevant and persuasive?
- Do you include any additional research that your client can optionally view?
- Is there a rationalization for information in this section not appearing in another section of the proposal?

2. Formal Proposal Presentation -

After completing your written proposal, you will then formally present your work to your client. For the context of this presentation, you will speak directly to your client. You have about 15 minutes to convince them that they should commission your group and no other to complete this project. You may use any/all sections of your Proposal, depending on how you want to organize your pitch. *Each group member must participate in the presentation*, and your group must provide some kind of visual aid to your presentation (PowerPoint slide show, handouts, mock-up website design plans, etc.)

V. Grading

Here's what I'm looking for in your Proposal:

Presentation

Is the proposal presented neatly and professionally (Is it paginated, clearly labeled, collated, free of surface errors?)

Thoroughness & Detail

Are all sections of the proposal complete? Is there enough information in each section to provide the client a clear understanding of the project and its benefits? Is each section detailed, but succinct and easy to read? Are all questions answered?

Persuasion

Is the proposal working to convince the client that your group is the most qualified for this job? Does the proposal convince the client that your plan is logical, beneficial, effective, and feasible? Does each section work to persuade the client? Does the proposal as a whole work together to persuade the client? Do you have enough research and data to be convincing? Is your writing style enthusiastic and persuasive?

Research

Does the proposal demonstrate a thorough understanding of Usability Testing? Does the proposal show your group's knowledge of your client's industry, goals, mission, and client population? Does the proposal show your familiarity with and knowledge of your client's website, its purpose(s) and needs? Do you show that you know your client's audience's needs?

Usability Test Methods

Is the Usability Test comprehensive, researched, and relevant to your client's needs? Are all the questions of the test written specifically to gain appropriate feedback and statistical information? Do the types of questions Is the test logically organized, clearly written, and appealing to your client's audience? Does the proposal include projected results of the Usability Test? Are these projected results plausible, and do they seem beneficial?

Organization

Is the proposal organized to be informative and persuasive? Is the organization logical? Is there minimal repetition of information? Does the proposal develop main points with evidence? Does each section build on the previous sections?

Grammar & Style

Does the proposal's grammar and writing style (syntax, diction, sentence variation) reflect a professional ethos? Does the writing appeal to the client's sense of having its concerns addressed, needs fulfilled, and benefits projected? Does the writing successfully, and dually, ask for the job and demonstrate your group's qualifications for the job?

Here's what I'm looking for in your Presentation:

Preparation & Delivery

Does your presentation address all sections of your formal proposal? Does your group look professionally appropriate for your specific client context? Is your presentation delivered smoothly, with clean transitions between presenters, topics, and visuals? Is the delivery of your proposal persuasive in tone and personae?

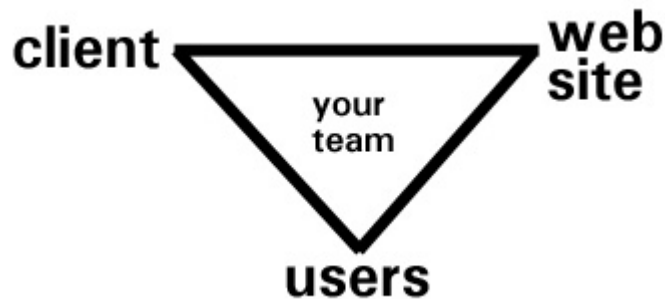
Usability Testing

Do you present your Usability Test and methods thoroughly? Does your presentation explain the goals, scope, and criteria of your test? Do you present your test as researched, reasonable, and beneficial?

Visuals

Do your visuals, whether in print or on screen, aid your client's understanding of your proposal and Usability Test? Do your visuals complement and supplement, rather than simply reiterate, what you say in your presentation? Are your visuals clear, concise, and easy to read? Does the sequence of your visuals logically flow with the sequence of your presentation?

The Usability Test: Starting the project. The first step in this project is to locate a web site that you want to test—and then to match that web site with its intended users (the people likely to be using it). The next element that you need for the project is a real client—that is, someone whose web site you are testing and for whom you will write your usability report.



- Locate a web site that would be interesting or useful to test. You could test the usability of one particular site, or you could compare two web sites. The focus of your usability test could be the quality and value of the information itself; the design and structure of the web site; and/or the functionality, navigability, and accessibility of the site. You could test users' reactions to specific site features—for example, the use of pop-up windows (do users like them or hate them? Are there some types that users prefer, other types they don't like at all?).
- Locate a client whose web site you can test. Ideally, you would find a client who is interested in doing some usability testing of their information product. Such a client could be, say, the Department of Computer Science at your university. Your team could do usability testing on the web site to determine its usefulness, its effectiveness, its navigability, etc. Or you might belong to an organization or work for a company whose online information you can test.
- Locate a set of users likely to be using the site or for whom the site is intended. Some usability testing focuses on learning more about a particular user group—say, children or senior citizens or 18–22 year old technogeeks. (Jakob Nielsen's research often focuses on a particular type of user.) Your usability test could attempt to answer questions about how a particular group interacts with a particular kind of information product.

Project goals. The goals of the usability testing and report are: (a) To generate data about the “usability” of a particular web site for its intended users. How easy or difficult is it for users to access? How helpful is its information? (b) To develop recommendations that help the client improve the web site. The educational goals for this project are for you to learn more about usability testing as a method of collecting information about web sites and about users of web sites; to learn more about how audiences interact with online information; to increase your understanding about the design of online information; and to teach you how to respond to a variety of authentic rhetorical situations in the workplace.

Definitions:

Usability

Usability refers to the ease with which a User Interface can be used by its intended audience to achieve defined goals. Usability incorporates many factors: design, functionality, structure, information architecture, and more.

User experience

The term "user experience" refers to a concept that places the end-user at the focal point of design and development efforts, as opposed to the system, its applications or its aesthetic value alone. It's based on the general concept of user-centered design.

User Interface

A User Interface (UI) is the interface by which a computer user is able to interact with the computer. It describes the way that the user uses input devices such as keyboards and mice, and the way the information is portrayed on screen or on the output device. A Graphical User Interface (GUI) uses visual controls such as menus and buttons to allow the user to accomplish tasks. The user typically uses a mouse. A console or command-line interface requires the user to type commands as text using the keyboard. A web site can be considered as having a User Interface. The term User Interface describes the way in which the user interacts with the Web site.

http://www.sitepoint.com/glossary.php?q=U#term_60

Interim and Related Assignments with Due Dates:

1. Assignment #4: Request for Proposal (RFP) & Letter of Interest (LOI)
 - a. Peer Review: Mon. 10/15 (JH2228)
 - b. Final Docs: Mon. 10/22
2. Assignments #5a&b (and HN 12a&b): Research Usability Testing
 - a. Why Usability Test? (In general & specific to your potential client.)
 - b. Expected benefits, pitfalls (In general & specific to your potential client) & potential recommendations

3. Assignment #6: Designing & Conducting Mini-usability Test.
 - a. Peer Review, 2 days, Wed. 10/31 & Fri. Nov. 2 (JH2228)
4. Assignment #7: Potential Client Meeting Minutes (No Peer Review, due 11/9)
5. Assignment #8: Progress Report (to me, your supervisor)
 - a. Peer review: Mon. 11/19 (JH2228)
 - b. Final Docs: Mon. 11/26
6. P2 Client Proposal
 - a. Peer Review: Mon. 11/28 & Fri, 11/30 (JH2228)
 - b. Final Draft: Mon. 12/10
7. HN #9: Do not want to collaborate with another group (Due: Oct. 12 & 15)
8. HN #10: Persuasion (Due as Presentation to Class: Oct. 24)
9. HN#11: Group Internal Obstacles (Due: Oct. 29 & 30)
10. HN#12a&b Research about prospective client, its site, competitors, usability testing
(Present to Class : Nov 5 & 7)
11. HN#13: Detailed Analysis of Problem or Need (Due: 11/14)
12. HN#14: Overview: Not your Ordinary Introduction (Due: 11/16)
13. HN#15: Persuasive Argument & Visual Rhetoric (Due: 11/26)

Groups- Revised 9/19/07					
Group #1		Group #2		Group #3	
Gary	Eric	Joe;	Stephen	Shawnt	Santi; Khamayah
Jessie	Heather	Pat	Rich	Veronica	Melissa
Group #4		Group #5		Group #6	
		Mike	Will	Ginelle	Vera
		Adam B	Adam M	Karen	Branden
Group #7		Group #8		Group #9	
Phil	Vicman	Wilson	Jason	Rebecca	Nancy
Rehan	Ernest; Shanon	Conor	Lawrence	Irfan	JR; Ramses