

< Application > Use Questionnaire.

Purpose.

The purpose of this questionnaire is for the internal apps development team to get an idea about how we all use <application> and discover areas that are not performing well and can be improved on. While the questionnaire is long, great care was taken to include only the questions answers to which are likely to make the biggest difference in the way <application> works for you. We value the time you take to answer the questions and will use your answers to make <application> the most user-friendly internal app in all the land!

Instructions.

- speak for yourself individually, rather than for all of the members of your team.
- quantify your answers to “how often” questions (i.e. once an hour, 10 times/week, 1 out of 5 tasks/times, never, etc.);
- if any of the questions jog your memory of another issue/problem/suggestion, please mention it.

For All Users.

- which group are you a member of?
 - o Admins / Billing / Development / Production / Sales / SiteDev / Support

<application> in general:

- what resolution do you set your monitor at (i.e. 1024x768, 1280x1024, etc.)? How big is the <application> browser window relative to the available screen space?

- is the text easy to read overall?

- how often, if ever, do you have more than one instance of <application> open? How do you feel about this? When was the last time this happened and what were the circumstances?

- in which part(s) of <application> do spend most of your time? Which parts of <application> do you not use?

- on multi-page list views, how often do you click “show all pages” vs. paging through?

Dashboard:

- on average, how many reminders and events do you have on your dashboard?

- how often do you click the My Tasks link off the dashboard to view your tasks (as opposed to just viewing them on the dashboard)?

- have you ever confused the “assigned to” and “created by” dropdowns in the issue search at the top of the page.

- when you add (create) an issue, is there a single assignee to whom you assign an issue most often (be it yourself or someone else)?

- when you open an issue, how often do you issue an email alert about it? Is there a predominant recipient of most of these alerts?

- when you close an issue, how often do you issue an email alert about it? Is there a predominant recipient of most of these alerts?

- how often do you edit an issue? When you do, which parts of the issue do you edit most often: Type / Priority / Assignee / Title / Description?

- how often do you send <mail application> to all sub-contacts for a given account?

- in <mail application> when was the last time you used:
 - o the toolbar buttons/dropdowns;

 - o the contact tags on the right;

 - o the “preview” button;

- which <mail application> template do you use most often?

- when adding a note:
 - o which note type(s) (i.e. shared note, left message, phone call, etc.) do you create most often?

 - o how often do you attach something to a note (use the attachment box / “Browse...” button)?

 - o how often do you use the “reminder” function. Do you find it useful?

 - o how often do you create an alert when adding a new note?

 - o when creating an alert, how often do you create an alert for a single person vs. a group (i.e. admins, production, support, etc.)?

- how often do you view note details (by double clicking the note in the Recent activity list)?

- how often do you create a comment when viewing a note?

- how often do you edit notes?

- how often do you delete notes?

- how often do you use the “Client Search” *button* (in the upper right corner of the dashboard) when you want to find a client?

Contacts.

- Is there a particular set / folder of contacts that you “deal with” most often?

- Which one do you do more often: searching for clients or browsing for clients (using the letter buttons underneath the search dropdowns)?

- In the search tool at the top of the page, which criteria/dropdowns do you use most often? Is there a single most common value that you select in each of the dropdowns you use? Are there dropdowns you don’t remember using at all?

- How often do you print/export listings? Which one do you do more often?

- How often do you sort the contact list? By which column?

- How often do you use the note icon (extreme left of the lead row in the list view) to:
 - o View the contents of its popup?

 - o Add a new note?

- View contact:
 - o Which one do you use more often: the Quick Reminder (at the top left) or the Reminder button (at the top right)?

 - o Quick Reminder: when was the last time you wanted to create a reminder that was not listed in the “Type:” dropdown?

 - o How often do you use the “Next New Lead” button?


- When was the last time you deleted a folder?

- Create contact:
 - o Do most new contacts of a particular type (Lead, Resellers, etc.)

Clients.

- How useful to you is the default list of 20 clients on the client search screen (after you click the big “Clients” button at the bottom of the screen? How could the client list be made more relevant to your needs?
- How often do you initiate client search by using the “Search” button at the top of the page (the one to the right of the “<mail application>” button) vs. the search dropdowns.
- In the client search at the top of the page, which criteria/dropdowns do you use most often? Is there a single most common value that you select in each of the dropdowns you use? Are there dropdowns you don’t remember using at all?
- How often do you sort the client list? By which column?
- By which column is it easier for you to identify a particular client in the client list: “Account Id” or “Company” or another one?
- In the client list, how do you select a client to view: double vs. single click, anywhere in the row vs. on account id, etc.?
- How often do you look up a contact for a particular client?
- If you need to look up a client contact which page do you go to most often to accomplish that?

Calendar.

- how often do you use the calendar and how useful do you find it overall?
- do you use any other calendar application, like the one built into MS Outlook?
- on the “Edit Event” view, how often do you use the date selection button/popup calendar ()?

Support.

- how often do you search for a particular ticket (using a keyword entry box) rather just browse the list?
- how often do you access the documents in the “documents” section? Which types of documents do you access most often?
- how do you usually get to documents (a) from within <application> or (b) by going to < url >?
- when was the last time you had difficulty (a) locating a particular document and/or (b) getting it in a way that was most useful to you?
- to access a document do you (a) select it from one of the six dropdowns, (b) click one of the links in the green bar at the top of the page and then on the document link, or (c) both depending on the situation. If (c), please elaborate.