Avvo

Usability Study

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Agenda Overview

Quick Summary

What we did

Investigated a product prototype for Avvo (Legal Forms)

Overarching Question

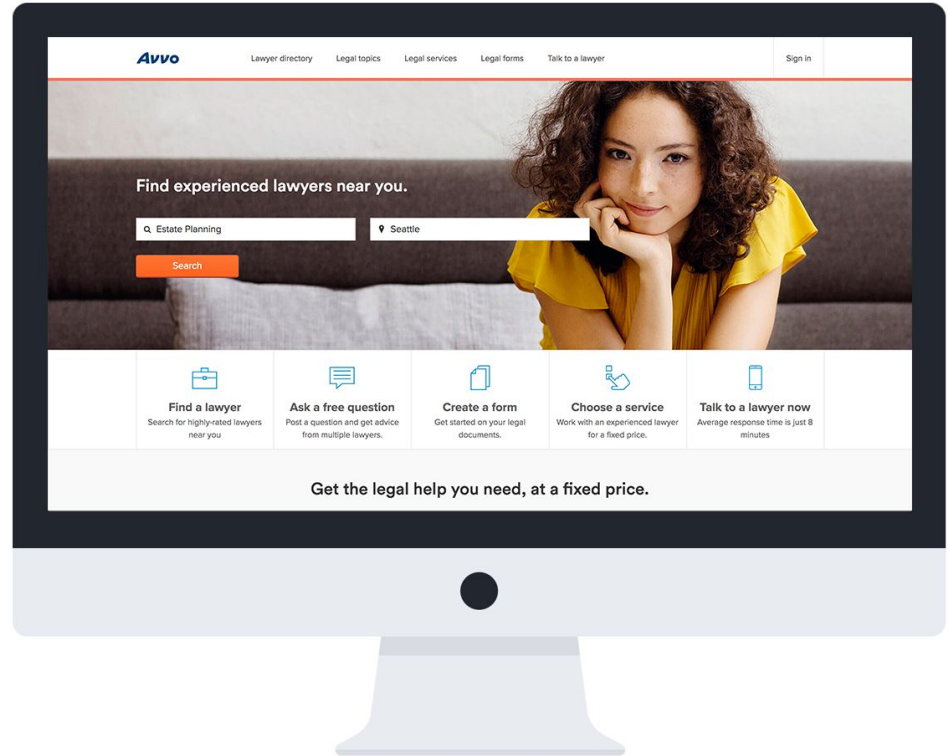"We want to know if we [Avvo] are on the right track."

Key Findings

The product is "on the right track," however there are opportunities in key areas to improve user experience.

Who is Avvo?

- Largest online marketplace connecting consumers to lawyers.

- Over 1 million lawyer profiles

- Avvo makes legal expertise accessible to regular people with no prior legal experience

Legal Forms

- Current product built for search engine optimization

- Expand functionality to allow users to easily complete legal documents

- InVision Prototype
  - High fidelity
  - Low functionality
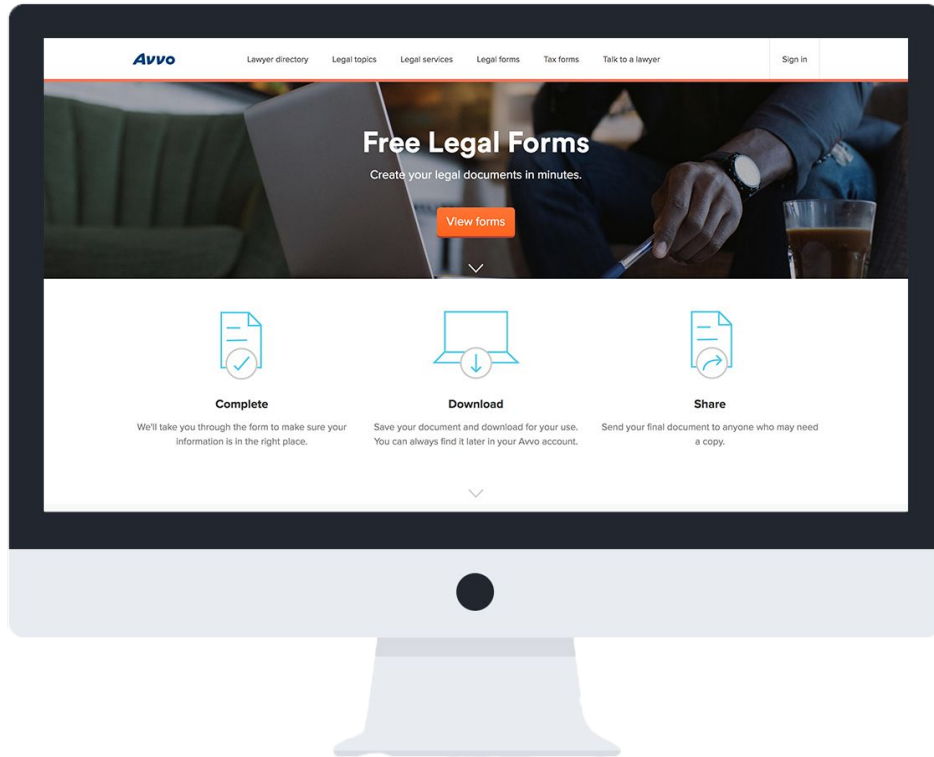
Research Objectives

- "We want to know if we [Avvo] are on the right track." - Puja (Avvo Senior UX Designer)

- Identify functions that enable users to efficiently customize legal forms

- Discover design inconsistencies and usability problem areas

Target Audience

Product Researchers

UX Designers

Product Engineers

Business Strategists

Participants

Profile

- Property Owners
- Long-Term Planners
- Next of Kin

Basic Qualifications

- Between 18 to 54 years old
- Basic computer skills
- Prior experience completing forms electronically
- Has or plans to complete last will and testament

How confident are you in your ability to properly complete the following legal documents WITHOUT needing legal services?
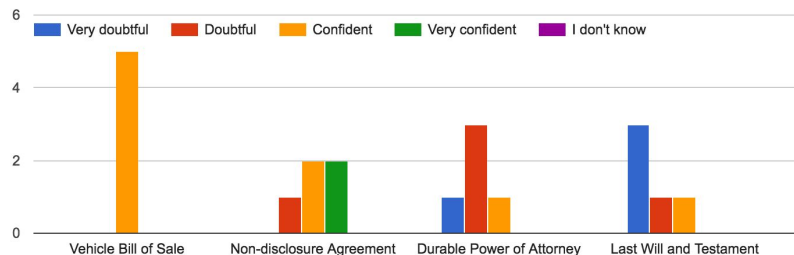
Which of the following best describes you regarding a Last Will and Testament?
(5 responses)
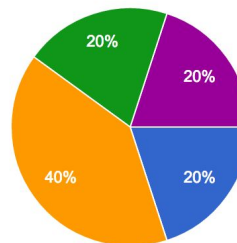
Test Environment

Locations

- Offices and conference rooms

Software

- OBS Studio
- Morae
- InVision Prototype

Study Kit Materials

- Consent form
- Task guide
- Moderator script
- Post-test questions
- $25 Amazon gift cards

Methodology

Usability Assessment Test

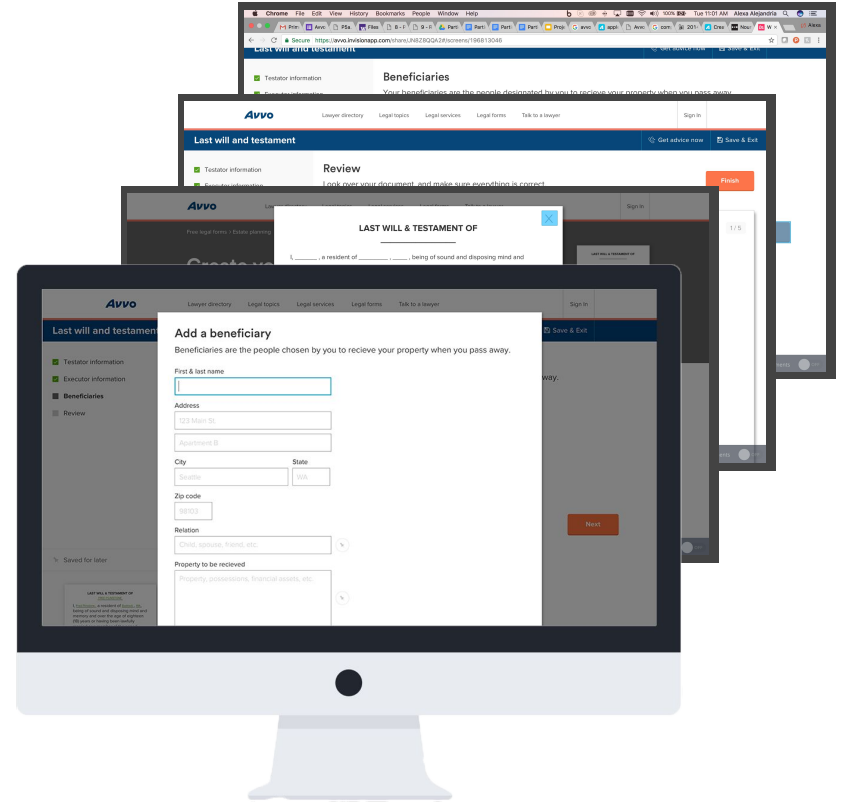- 1 Participant
- 1 Moderator
- 1 Observer
- ~30 minutes

Streamlined Cognitive Walkthrough

- 7 Tasks
- "What would you do to complete this task?"
- "How would you know you are successful?"

Post-Test Interview

Data Collection

Verbal Responses

- Pre-task CW Questions
- Post-test Interview

Data Types

- Qualitative
- Subjective

Analyzed for common themes

- Affinity Diagram

Question or issue	Data	Type	Collection	Planned Analysis	Task
Users' expectations of interactions required for task completion	Verbal responses	Qualitative, subjective	Interview	Content analysis	What would you do accomplish <given> task?
Users' expectations of indication of task success	Verbal responses	Qualitative, subjective	Interview	Content analysis	How would you know you were successful?
Steps to enter form tool align with users' expectations?	Verbal responses	Qualitative, subjective	Interview	Content analysis	1. Enter form tool
Steps to sign into Avvo account align with users' expectations?	Verbal responses	Qualitative, subjective	Interview	Content analysis	2. Sign into Avvo account
Steps to selection of whose will align with users' expectations?	Verbal responses	Qualitative, subjective	Interview	Content analysis	3. Begin completing your own Last Will & Testament
Steps to enter testator information align with users' expectations?	Verbal responses	Qualitative, subjective	Interview	Content analysis	4. Add a Testator to your LW&T
Steps to enter executor information align with users' expectations?	Verbal responses	Qualitative, subjective	Interview	Content analysis	5. Add an Executor to your LW&T
Steps to enter beneficiary information align with users' expectations?	Verbal responses	Qualitative, subjective	Interview	Content analysis	6. Add a Beneficiary to your LW&T
Steps to finalize the document align with users' expectations?	Verbal responses	Qualitative, subjective	Interview	Content analysis	7. Review and finalize completed document
Legal term presentation and definitions adequate?	Verbal responses	Qualitative, subjective	Interview	Content analysis	Provide response in post-task interview
Live preview useful?	Verbal responses	Qualitative, subjective	Interview	Content analysis	Provide response in post-test interview
Save for later (pin) feature useful?	Verbal responses	Qualitative, subjective	Interview	Content analysis	Provide response in post-test interview
Save/recall form functionality useful?	Verbal responses	Qualitative, subjective	Interview	Content analysis	Encompasses all tasks
Users' satisfaction with overall experience?	Verbal responses	Qualitative, subjective	Interview	Content analysis	Provide response in post-test interview
Users' suggestions for improvements?	Verbal responses	Qualitative, subjective	Interview	Content analysis	Provide response in post-test interview

Data Collection and Analysis

Pin Feature (Save Items for Later)

Research Question

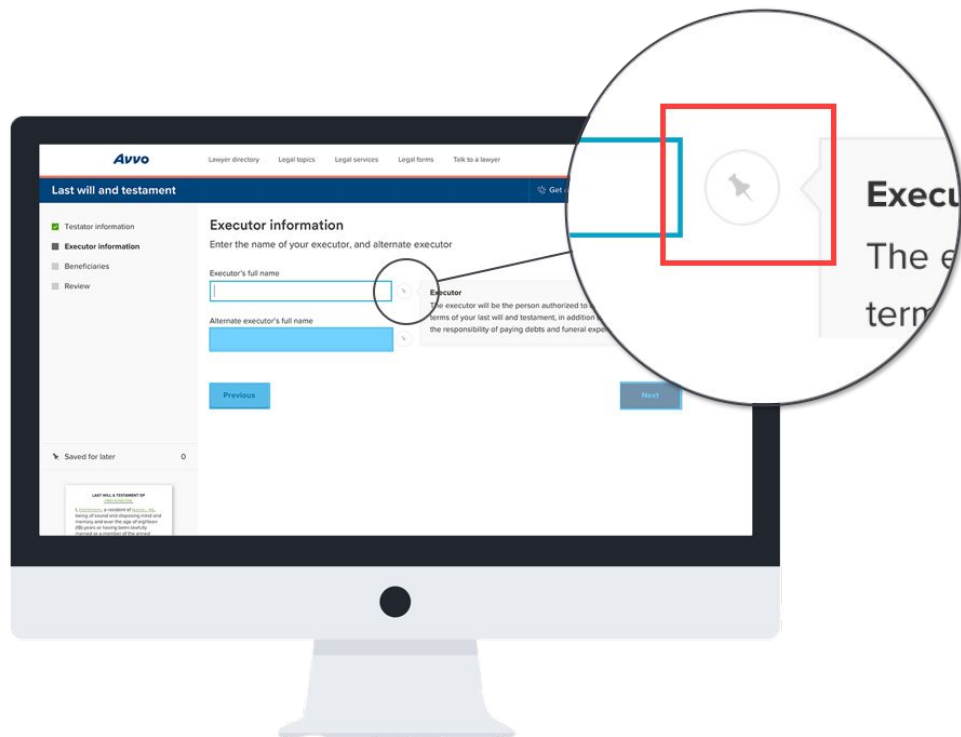*"Will users understand and find it useful or not?"*

- 5/5 participants had an incorrect idea of what it indicated
- 5/5 Guessed:
  - Definition of a term
  - Example input
  - Ability to look at other documents

Participant Quote

"I would guess it shows an example of what goes in this box."

Opportunity/Recommendation

- A tutorial or 'tooltip' that would explain the purpose of the feature

Legalese

Research Question

"Will users be well-equipped to understand terms?"

- 4/5 participants struggled to understand legal terms used in the document
- 2/5 agreed they would leave the site to look up definitions

Participant Quote

> *"I would like for the site to provide a definition of 'Executor'."*

Opportunity/Recommendation

- Consistent definition of legal terms via tooltip
- Glossary of common legal terms
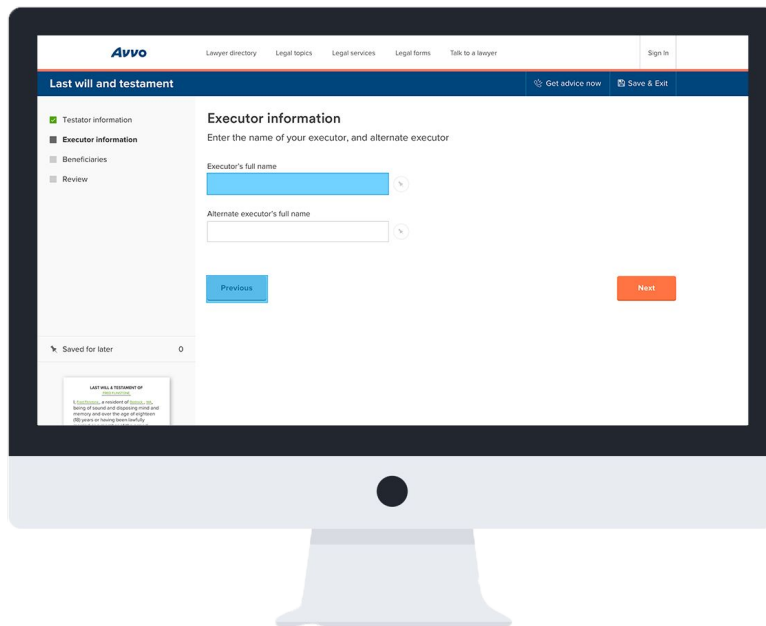
Live Preview

Research Question:

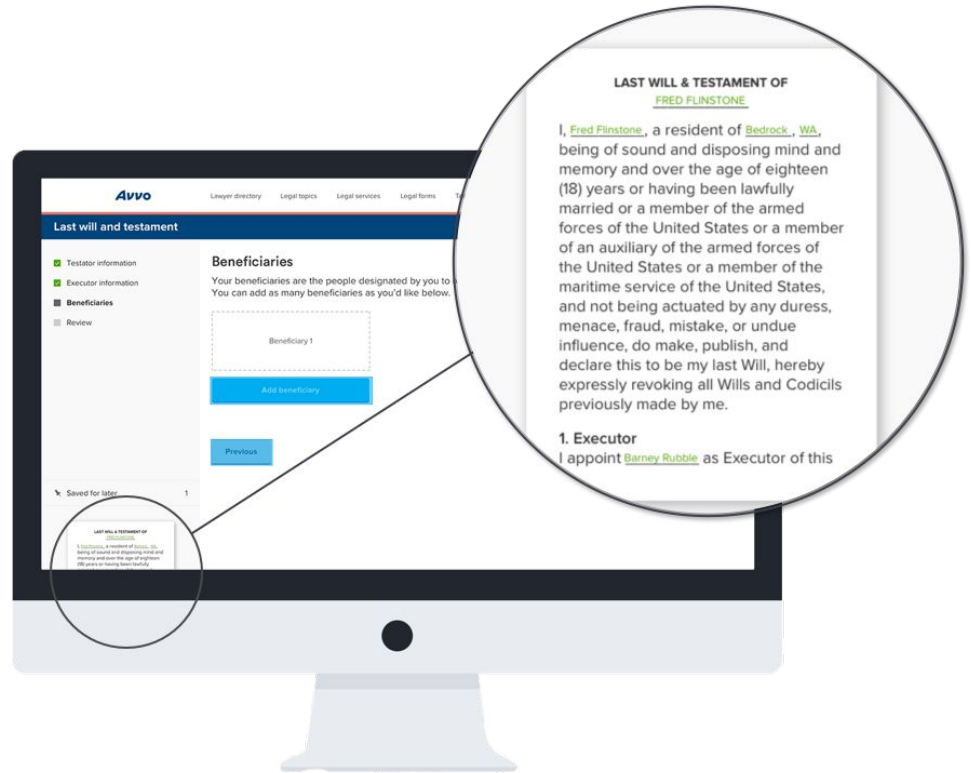*"Will users discover the Live Preview Feature?"*

- 2/5 discovered/noticed the Live Preview of their own accord
- 2/5 discovered it in the last third of the document process
- 5/5 agreed with its usefulness

Participant Quote:

"This would've been a lot nicer if it was in a spot I could see it."

Opportunity/Recommendation

- Move to a more visible location

Security

Research Findings

- 1/5 expressed concerns about the security of the login process
  - Sensitive Information
  - Shared Document
- Resulted in compromised site trust

Participant Quote

"I expect the site to ask me to provide more personal information and in-turn I expect a more arduous login process."

Opportunity/Recommendation

- Create a 'read-only' share option
- Require Two-Step Login Process
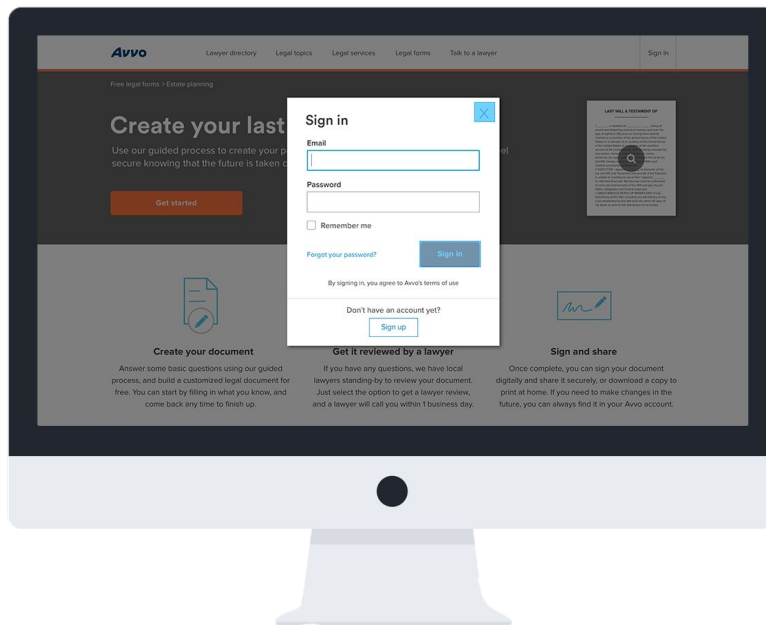
Beneficiaries

Research Findings

- 4/5 struggled with task
- 1/5 failed the task completely
- 1/5 wanted more constraints on property
- 1/5 was offended by lack of information needed

Participant Quote

"I'd have to play with it to understand how to add a beneficiary."

Opportunity/Recommendation

- Remove the dotted line around the beneficiary information
- Add more complexity, especially to property
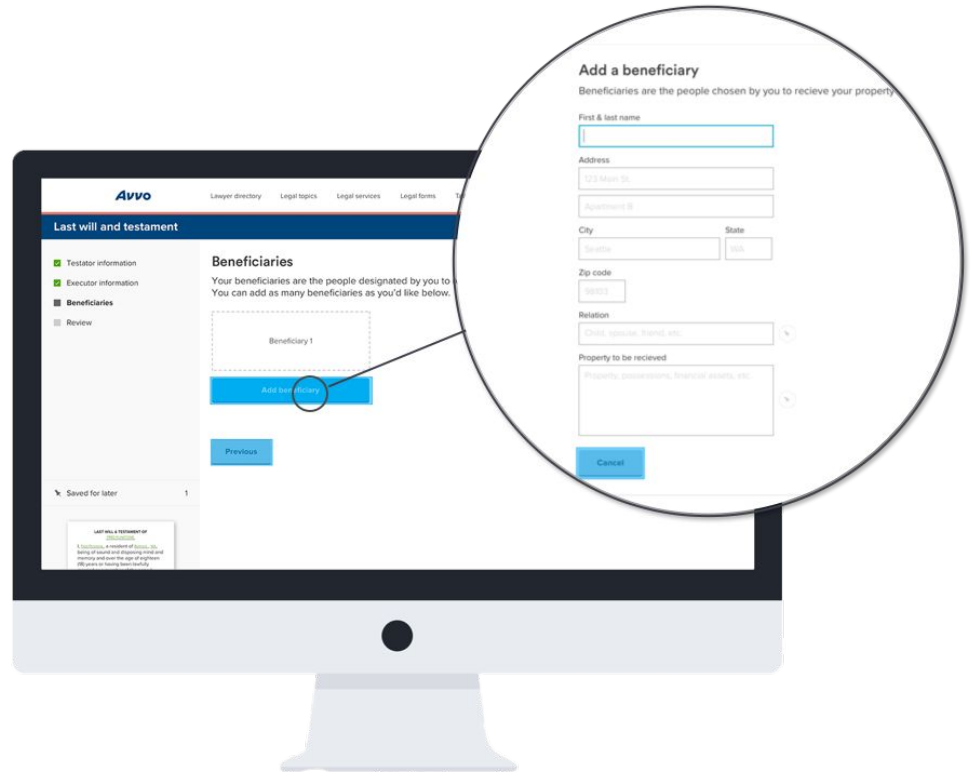
Confirmation of Completion

Research Findings

- 5/5 didn't know what would come next
- 5/5 agreed document should be reviewed by lawyer
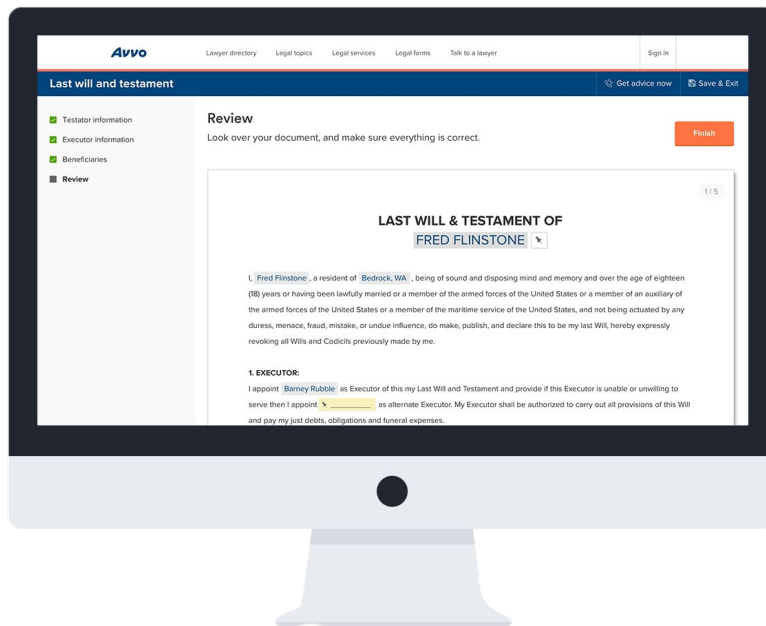- 5/5 weren't convinced it was legally binding

Participant Quote

"That's it?"

"I want to speak to a lawyer, I don't feel that this is legally binding."

Opportunity/Recommendation

- After hitting "Finish," connect to lawyer
- Require Two-Step Login Process

Other Opportunities

"Would be great if Avvo filed this for me when complete."

"When I am watching my kids I don't have time to talk on the phone.I would want to chat with someone if I had questions."

"Is this legitimate? The lack of authentication makes it feel fake."

- Users unanimously wanted the document to autosave

- Chat support functionality

- Promote the ability to connect to a lawyer after completion

Things Done Well / Positive Findings

Aesthetics:

- Overall clear, concise, and straightforward interaction flow
- Non-aggressive design; Not like a government document
  - *(1/5 disagreed with minimal design – expected more for security purposes)*

Functionality:

- Term definitions were helpful once discovered
- The "Next" button proved a good indicator for task completion
- 3/5 liked and agreed with the Live Preview feature once discovered

What We Would Change About The Study

- More communication with the client

- More focus on screener survey – deploy earlier

- Consensus early regarding what aspects to investigate and methods used

- Compare between prototype and existing product (i.e. comparative analysis)

Questions