

Discussion Guide

The objective of the Discussion Guide is to provide a loose outline of the conversation for the interviews. Questions are not meant to be read word for word, but rather a guide to ensure all relevant points are discussed during the time allotted.

Research Approach

This is a task-based user assessment of the Sprint to District dashboard prototype, focusing on the interactions and layout of the dashboard as well as how it compares to the existing approach.

As the moderator, I will follow the lead of the respondent. I will first take a “backseat” approach after explaining the task to the user. If I have either a) someone who is not explaining their thoughts or b) showing that they are clearly lost in the interface, I will intervene with the probing questions outlined in this document.

If I have a user who is clear, well spoken, and on-task, I will let them completely finish each task or flow on their own. Once the task is complete, I will ask follow up questions on their experience for each task. Some questions will be answered by direct questioning, while others will be answered by observation of the respondent’s actions (e.g., navigation behaviors).

Introduction

Thank you for coming in today. My name is **<Add Name>**, and I’ll be your researcher. We are here today to discuss how you could experience a new Primerica tool. We’ll spend about sixty minutes discussing just that.

This is in no way a test; the only “right” answers are your opinions, so I hope you will share your thoughts openly with me. Also, please note that I was here to show you a new concept and have no personal ties to it, so love it or hate it, you won’t hurt my feelings.

As a reminder, I am recording this session as a reference to help me remember what you say; is that ok with you?

Do you have any questions before we get started?

Part 1: Understanding the User and Background Information

1. Tell me a little bit about yourself?
2. How long have you’ve been working with Primerica?
3. How comfortable are you with technology?

4. What types of activities do you do online? What device do you prefer to use? Are there certain tasks you prefer to do on one device compared to another?
5. Do you know how your team is performing?
6. How do you recognize (make public or remember) your reps' achievements?
7. How do you feel about your current process of managing our clients and base? What do you like about it? What do you wish we would do differently?
8. Walk me through what you currently do to keep your team accountable.
9. Do you use any apps? What features of various apps do you use?
10. What do you use Primerica App for? features? appointments, contacts, reports?
11. Would you use the app to make it easy for you to contact your team? Or other tools that are simple and user friendly? If so, what tools do you use?
12. What tools do you use to motivate your Reps & how could we make those tools more accessible or our tool similar? What tools are you currently using?
13. What tools would make tracking easier on a mobile device?
14. What would drive you to be more competitive in recruiting?
15. Would you be interested in a platform that submitted and shared the 5 best ideas across the company?

Part 2: Review the Dashboard

The dashboard prototype will be presented in a counterbalanced order across respondents.

Dashboard Intro:

Now we're going to look at a concept and discuss your thoughts about it. Keep in mind that this is a prototype, so some parts of it may not be working, but it's adequate for our conversation today. If you could think out loud as you go that would be very helpful for me in following along.

[\[Dashboard\]](#)

16. First Impressions. What are your initial thoughts when you first open this page?
17. Can you describe what you see? Based on what you see, what would you guess you are able to do here?
18. Can you point out 3 or more things you believe are the most important information for you and your business? Is there something here that is important for you but don't see?

19. What do you think about how the page is laid out? If you could re-arrange or add to this page, how would you do it?

Part 3: Review Options

1. Let's continue with the prototype. Click on "Show Options"
2. Just like before, can you describe what you see, your impressions, and expectations from this screen?
3. Is the information you see relevant to your business?
4. Is there any information that is missing? What would you add to this screen?
5. Focusing on the alerts, how comfortable would you be setting it up? Does this meet your expectations?

Part 4: Review Goals

1. Let's go back and click on goals.
2. Just like before, can you describe what you see, your impressions, and expectations from this screen?
3. On a scale from 1-10, 1 being not at all to 10 being very, how clear is the information presented to you?
4. How relevant is this information to your business.

Part 1: Home Screen

We're going to switch to another prototype. It's going to be the same process like we did for the dashboard. We're going to look at a concept and discuss your thoughts about it. Keep in mind that this is a prototype, so some parts of it may not be working, but it's adequate for our conversation today. If you could think out loud as you go that would be very helpful for me in following along.

1. Can you describe what you see?
2. What do you expect to be able to do?
3. Click on the circle with the plus. What are your impressions of what you see? Is it clear to you?
4. Click on < go anywhere >

Part 2: Review Qualify contacts

5. How valuable is it for you and your business to be able to qualify contacts automatically?
6. Is there something you would change/add to this process?
7. How would automatically qualifying contacts fit into your current process?

Part 5: Overall impression

1. Based on what you saw in the prototype, how valuable is it to you and your business?
2. If this product was released as is, how likely are you to use it? Why or why not
 - a. If no: what would motivate you to use it more often?
 - b. If yes: what about the app motivates to use it
3. If you had a magic wand, what would this tool look like for you?