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Ad Search Usability Test Plan

Test Date: 12.15.2006

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1.0 Revision History

<i>Date</i>	<i>Version</i>	<i>Description</i>	<i>Author</i>
12.11..2006	1.0	Initial Draft	Lisa Colvin

2.0 Project Stakeholders

<i>Role</i>	<i>Name</i>
Product Manager	Rob Harol
Project Manager	Scott Secord
Visual Designer	Eric Giovanola
Engineering	Gareth Ballester
Engineering	Young Yang
Engineering	Philip Do
Engineering	Meade Robboy
Product Management Lead	Dong Chang
System Architecture	Craig Tadlock
Technical Assessment	Soren Nielsen
Product Marketing	Lucy Lieberman
Product Management	Sara Hicks
Engineering	Marco DeMello
Operations	David Waxman

3.0 *Executive Summary*

3.1 *Objective*

3.1.1 The overall project objective is to Implement Endeca Search and Guided Navigation features to improve a site visitor's ability to find advertising information on the site.

3.1.1.1 Business objectives include increasing ad relevancy, improving internal cataloging of ads, leveraging Endeca Merchandising to position product and content directly to users, and improving conversion rates.

3.1.2 The overall objective of the usability test is to determine whether users are able to accomplish search goals with the new software and UI.

3.2 *Scope*

3.2.1 The scope of the Usability Test will be limited by necessity to basic Ad Search functionality as system development is still in process and is not due to the QA environment until 1/19/07.

3.2.2 If time allows, users will be asked to view several ads appropriate to their business and offer an opinion on the quality/ likeability of the ad.

4.0 Overview

4.1 Background & Purpose

- 4.1.1 The current search engine used on the Spot Runner site is Lucine (open-source software).
 - 4.1.1.1 The existing functionality is fairly limited and is not featured in the UI.
 - 4.1.1.1.1 In the existing UI, it is not readily apparent that a search function exists.
 - 4.1.1.1.2 In fact, less than 2% of users are currently accessing the search.
 - 4.1.1.2 Current search results are non-optimal, in that users are not informed about the success of the search (internal and external) and granular refinement is not available.
 - 4.1.1.2.1 Currently, we do not display the number of results retrieved or any keywords/ tags attached to the assets.
 - 4.1.1.2.2 There are limited descriptions available.
 - 4.1.1.2.3 There is no refinement capability/ search within search, etc.
 - 4.1.1.3 There is currently no reporting or search measurement capability.
- 4.1.2 Spot Runner chose to purchase Endeca software because it provides so many benefits, including search query analysis, thesaurus construction capability, faceted navigation, etc.
- 4.1.3 A new UI has been developed to support the features and capabilities of the new engine.
- 4.1.4 The purpose of the usability test is to solicit user/ customer feedback on the UI specifically, and to examine their reactions to the new search capabilities and the implementation thereof.

4.2 Parent Project Goals

- 4.2.1 Project Objectives (Source: Endeca Requirements Definition Document)
 - 4.2.1.1 Implement Endeca IAP Search and Guided Navigation features to improve a site visitor's ability to find advertising information on the site.
 - 4.2.1.2 Enable Endeca Merchandising to position products and/or content to receptive site visitors.
 - 4.2.1.3 Leverage User Reporting to identify how customers are searching and navigating on the site.
- 4.2.2 Business Objectives (Source: Endeca Requirements Definition Document)
 - 4.2.2.1 Increase Ad relevancy
 - 4.2.2.2 Improve internal cataloging of ads
 - 4.2.2.3 Leverage Endeca Merchandising to position product and content directly to users
 - 4.2.2.4 Improve conversion rates

4.3 *Scope*

- 4.3.1 The overall scope of the Usability Test will be limited by necessity as system development is still in process and is not due to the QA environment until 1/19/07.
- 4.3.2 The specific scope of the test will be limited to Ad Search functionality.

4.4 *Objective*

- 4.4.1 The overall objective of the usability test is to determine whether users are able to accomplish search goals with the new software and UI.
- 4.4.2 A secondary objective, time permitting, is to determine likeability and quality of the ad library.

4.5 *Participant Profile*

- 4.5.1 Spot Runner contracted with Adept Consumer Testing to procure participants for this test.
- 4.5.2 Ten participants were recruited from a variety of business types and incomes. (see Appendix 1)
- 4.5.3 The standard Screening Questionnaire was utilized (see Appendix 2) with slight modifications (verbal) to allow a broader range of participants.

4.6 *Metrics*

- 4.6.1 Resulting test metrics will be primarily qualitative, as quantitative metric tracking is dependent upon availability and installation of the purchased Morae software suite which will not be available for this test.
 - 4.6.1.1 Respondents will be asked for their opinion and feelings regarding various tasks.
 - 4.6.1.2 The moderator and test team will track progress and draw conclusions based on comparisons of reactions across the subject group.
 - 4.6.1.2.1 The team will attempt to track
 - 4.6.1.2.1.1 number of searches completed
 - 4.6.1.2.1.2 number of hard stops
 - 4.6.1.2.1.3 number of assists needed

4.7 *Reporting*

- 4.7.1 A report (including findings and recommendations) will be produced in the week following the test and submitted to the testing team for review.
- 4.7.2 Once the report is approved by the testing team it will be distributed to all stakeholders.
- 4.7.3 As the tests will be taped, CDs will be available for viewing alongside the report if desired.

5.0 Logistics

5.1 Schedule

- 5.1.1 The tests are scheduled for Friday, December 15, 2006.
- 5.1.2 Each test will last one hour, scheduled as follows:
 - 5.1.2.1 9-10, 10-11, 11-12, 12-1, 1:30-2:30, 2:30-3:30, 3:30-4:30 and 4:30-5:30.
 - 5.1.2.2 We may have one additional session at 5:30pm, depending on attendance.

5.2 Location

- 5.2.1 The test is scheduled in Conference Room Duke in the Spot Runner offices.
- 5.2.2 Observation will be in the Spot Runner testing facility immediately adjoining the conference room.

5.3 Roles

- 5.3.1 Moderation will be performed by Lisa Colvin, Lucy Lieberman and Joyce Chen, as available throughout the day.
- 5.3.2 Participants will be escorted to and from the facility and provided with payment by Lisa Colvin, Joyce Chen, or Eric Giovanola.
- 5.3.3 Camera and recording support will be provided by the Help Desk, Eric Giovanola or Joyce Chen.
- 5.3.4 Additional Spot Runner team members will observe the testing throughout the day.

5.4 Participants / Compensation

- 5.4.1 The test team will be notified via Instant Message (IM) by the Front Desk receptionist when the participants arrive.
- 5.4.2 Participants will be escorted to and from the test room from the front desk area of the Spot Runner offices.
- 5.4.3 Each participant will be provided with a gratuity of \$125.00.

5.5 Equipment, Software & Hardware

- 5.5.1 Morae Manager, Recorder and Remote Viewer Components have been purchased but are unavailable for use in this test. Therefore, standard two camera recording will be employed.
- 5.5.2 Users will navigate the Ad Search pages on the Test Group laptop.
- 5.5.3 Testing will take place in the `usertesting` environment on Spot Runner's servers.
(<http://usertesting.spotrunner.com/>)

6.0 Scenario

6.1 Overview

- 6.1.1 Users will be asked to browse the site to find ads appropriate to their business. They will freely navigate the site and the moderator will ask questions, observe and prompt as needed.
- 6.1.2 Users will be given tasks to narrow, expand and change their search parameters.
- 6.1.3 Users will view videos and navigate to Ad Detail.

- 6.1.4 If time allows, users will be asked to view several ads appropriate to their business and offer an opinion on the quality/ likeability of the ad.

6.2 *Task Description*

6.2.1 Primary Tasks: Ad Search

6.2.1.1 High-level Search

- 6.2.1.1.1 Can users find an ad that's relevant to their business? (quality of the search)

- 6.2.1.1.2 Can users accomplish a specific task as stated?

6.2.1.2 General Interface & Navigation

- 6.2.1.2.1 Can users navigate keyword search (e.g. additions and deletions, linked keywords vs. search box)?

- 6.2.1.2.2 Can users navigate categories (e.g. expand and narrow)?

- 6.2.1.2.3 Can users navigate page to page?

- 6.2.1.2.4 Are users able to find ad detail?

- 6.2.1.2.5 Do they know what comes next?

- 6.2.1.2.6 How do they continue in order to buy the ad?

- 6.2.1.2.7 Can they get "back" to the results page without using the "Back" button?

6.2.1.3 General Content

- 6.2.1.3.1 Is the number of ads displayed per screen appropriate?

- 6.2.1.3.2 Is the information displayed adequate?

- 6.2.1.3.3 Is the information displayed enough to allow users to feel confident in selecting the ad for purchase?

6.2.1.4 Video Interaction

- 6.2.1.4.1 Do users know that these are videos?

- 6.2.1.4.2 Do they attempt to play them? If so, how do they interact with controls? (Volume? Pause? Stop? Etc.)

- 6.2.1.4.3 Is the size of the controls adequate? (Missing large overlay of Play icon)

6.2.2 Secondary Task: determine likeability and quality of the ad library.

- 6.2.2.1 Can users find an ad that they like? (quality of the product)

- 6.2.2.2

7.0 *Script*

7.1 *Introduction and Background (5 minutes)*

- 7.1.1 Welcome the user to the company, establishing rapport.

- 7.1.1.1 As you are talking, make sure the cameras are in the right areas, and adjust if not.

- 7.1.2 Ask if they are familiar with Spot Runner and explain what we do.

- 7.1.3 Ask about their business and if they have ever advertised on TV or considered it.

- 7.1.3.1 If not, what were the points that prevented them?

- 7.1.3.2 If so, what were the results?

7.2 *Overview of Test (2-3 minutes)*

- 7.2.1 Explain that as part of ongoing development, we are continually updating our site and services to provide a better experience for our customers. As a part of that development, we ask for valuable feedback from customers or future customers just like them.
- 7.2.2 Point out that we are taping the test, but that it will only be used to help us write the reports. Make sure they are ok with being taped.
- 7.2.3 Clarify that we aren't testing them or their abilities. If they encounter a problem, it's because we need to fix something.
- 7.2.4 Since this is a test and development is not completed, there will be bugs. Note that the final look and feel has not been implemented, so they will probably see some things that look a little funny or aren't acting like they should.
- 7.2.5 Let them know that any and all feedback is valuable and to feel free to say anything they want without hurting our feelings. Tell them that we didn't design it; we're just here to test and make sure it works the way it should.

7.3 *Overview of Tasks (2-3 minutes)*

- 7.3.1 In general, describe the tasks that we're going to ask them to do today.
- 7.3.2 They will be asked to navigate around the site freely, talking out loud so that we can document their reactions.
- 7.3.3 Then we'll ask them to see if they can accomplish a certain task. Point out that we'll ask all our testees to perform the same task, and that way we can have a baseline for comparison.
- 7.3.4 Don't mention that if we have time, we'll ask them to view and give feedback on the ads; we don't want to disappoint them.

7.4 *First Task (20 minutes)*

- 7.4.1 The laptop browser should be set to the Ad Search home page in Firefox with the Keyword Search field cleared.
- 7.4.2 The url is <http://usertesting.spotrunner.com/ads/Default.aspx>
- 7.4.3 Ask the user what they would do if they wanted to find an ad for their personal business. Don't prompt unless asked for direction.
- 7.4.4 Allow the user control of the mouse.
- 7.4.5 They can enter a keyword or Browse by Industry. Note their choice.
- 7.4.6 Once they enter the search results page, remind them to think aloud and to look at a few different ads, perhaps narrowing their search, etc.
- 7.4.7 Use some of the questions in section 6.2.1 if needed.
- 7.4.8 Monitor what they do, asking enough questions to keep the session moving, but not so many as to interfere.
- 7.4.9 Make sure they view some videos, and look at Ad Detail.
- 7.4.10 Solicit broad feedback, making sure most questions in section 6.2.1 are covered.
- 7.4.11 Segway to the second task.

7.5 *Second Task (15 minutes)*

- 7.5.1 Take back control of the mouse and return to the Ad Search home page in Firefox.
- 7.5.2 The url is <http://usertesting.spotrunner.com/ads/Default.aspx>
- 7.5.3 Clear the Keyword Search field for the user.
- 7.5.4 Ask the user what they would do if they wanted to find an ad for their personal business. Don't prompt unless asked for direction.
- 7.5.5 Allow the user control of the mouse.
- 7.5.6 Ask the user to pretend that they own a sporting goods store and that they are running a special on canoes and kayaks.
- 7.5.7 See how they choose to search.
 - 7.5.7.1 If they use a keyword, ask them to narrow refine by category and see which they choose.
 - 7.5.7.1.1 Note that the preferred path is : Sports & Recreation >> Outdoor Sports & Recreation >> Boats & Boating >> Canoeing & Kayaking
 - 7.5.7.2 If they use a category, ask them to refine by keyword and see which they choose.
 - 7.5.7.2.1 Do they click on a linked keyword or enter one in the box?
 - 7.5.7.2.2 Is the search field entry intuitive?
 - 7.5.7.2.3 Do they miss the radio button selection for Search Within/ New Search?
- 7.5.8 Makes sure they view ads and Ad Detail. Can they get back to the Search results? (Note: State "return" to search results, so as not to skew for "Back" button issues.
- 7.5.9 Did they find the right category or an appropriate ad?
- 7.5.10 Segway to the 3rd task if time permits.

7.6 *Third Task (10 minutes – if time is available)*

- 7.6.1 Let the user know that since we have extra time, we'd like their open on some of the ads themselves- not the search. Take back control of the mouse and return to the Ad Search home page in Firefox.
- 7.6.2 The url is <http://usertesting.spotrunner.com/ads/Default.aspx>
- 7.6.3 Clear the Keyword Search field for the user.
- 7.6.4 Ask the user to find a few ads that look interesting and are relevant to their business.
- 7.6.5 Allow the user control of the mouse.
- 7.6.6 As they watch videos, ask what they like dislike, etc.
- 7.6.7 Solicit as much feedback as possible in the timeframe.
- 7.6.8 Finally: Would they buy an ad from us? Are they interested in becoming a customer?
- 7.6.9 Segway to the wrap-up.

7.7 *Wrap-up and Thanks (5 minutes)*

- 7.7.1 Thank the user for their time and provide them with their check.
- 7.7.2 Escort them to the front desk and make sure they receive validation.

8.0 Open Issues

#	Issue and Description	Owner	Target Date
1	Issues exist with the state of the build. Mitigation: Plan test around issues.	L. Colvin	12.14.2006
2			

9.0 Closed Issues

#	Issue and Description	Resolution
1	None at this time	
2		

10.0 Appendix 1: Participant Matrix

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ADEPT CONSUMER TESTING														
FRIDAY, DECEMBER 15TH, 2006														
IDIS: "USABILITY PROSPECTS" 9:00AM - 5:30PM														
OFF SITE - SPOT RUNNER 6300 WILSHIRE BLVD. 21ST FLOOR, LOS ANGELES, CA 90048														
NAME	TIME	COMPANY NAME	Q.1 ROLE ADVERTISING DECISIONS	Q.2 ROLE WITHIN COMPANY	Q.3 CUSTO ACCESS	Q.4 CUSTOMER CLIENTS	Q.5 ANNUAL GROSS REVENUE	Q.6 SPEND ON ANNUAL MARKETI NG	Q.7 EMPLOYE AT THIS LOCATION	Q.9 CUSTOMI TY COMMER CIAL	Q.10 ACTIVITI ON INTERNE T	Q.11 ITEMS USED TO ADVERTISE	Q.12 AGE	Q.13/14 COMPUTE INTERNET SKILLS
1 Merle Kennedy	9:00 AM	Centery City Flower	Key decisio n maker	Marketing Mgr.	Both	Consumer	\$500k-\$1M	\$10k-\$25k	6	Very likely	1,2,3,5,6	Ever-A,E Currently-A,H,I,J,K,L	38	10 / 10
3 Carrie Markott	10:00 AM	Maximum Security Systems	Part of a small group	Owner	Both	Both	\$1M-\$2.5M	\$25k-50k	12	Somewhat likely	1,3,5	Ever- B,E,G,H,I,J Currently-A,J,K	48	6 / 6
4 Marve Jacoby	11:00 AM	Advance Floor & Window	Part of a small group	Owner	Retail store	Consumer	\$1-\$2.5M	\$10k-\$25k	2	Somewhat likely	1,4,5	Ever-A,E,H,I,J,K,L Current-H,J,K,L	56	5 / 5
5 Brian Lu	12:00 PM	Medimmon e	Key decisio n maker	Marketing Mgr.	Retail store	Both	\$10M-\$25M	\$10k-\$25k	30	Somewhat likely	1,2,3,4,5, 6	Ever-A,E,H,I,K,L Currently-I,K,L	36	8 / 8
	1:00 PM TO 1:30PM													
6 Larry Leacaberg	1:30 PM	LAMACO	Key decisio n maker	Owner	Both	Both	\$500k-\$1M	\$10k-\$25k	17	Very likely	1,2,3,4,5, 6	Ever-A,E,G,H,I,J,K,L Currently-	56	10 / 10
7 Ira Lippman	2:30 PM	Pet Emporium	Key decisio n maker	Owner	Both	Consumer	\$1M-\$2.5M	\$50k-\$100k	23	Very likely	1,2,3,4,5	Ever-B,D,G,I Currently-A,F,H,K,L	54	5 / 7
8 Jeff Levy	3:30 PM	Animal Crackers	Key decisio n maker	Owner	Both	Consumer	\$1M-\$2.5M	\$10k-\$25k	5	Somewhat likely	1,2,3	Ever-A,E,F,G,J,K Currently-A, J,K	54	8 / 8
9 Etan Loraat	4:30 PM	Law Office Etan Z Loraat	Key decisio n maker	Owner	Both	Consumer	\$500k-\$1M	\$10k-\$25k	3	Very likely	1,2,5	Ever-E,G Currently-A,K	51	5/7
8 Steve Mackawa	5:30PM FLOATER	Olympia Medical Center	Part of a small group	CFO	Both	Consumer	\$85M	\$100k-\$500k	100-499	Somewhat likely	1,2,3,5	Ever-B,E,F,H,I,J Currently-A,J,K	59	8/8

Group: NOT Angeles

Q.10	Q.11
1=BUY PERSONAL ITEMS	A=YELLOW PAGES G=LOCAL SHOPPER
2=BUY ITEMS FOR MY BUSINESS	B=RADIO H=DIRECT MAIL
3=PAY PERSONAL BILLS	C=TELEVISION - LOCA I=MAGAZINES/JOURNALS
5=PAY BUSINESS BILLS	D=TELEVISION - CABL J=OUTDOOR ADVERTISING
6=EMAIL CUSTOMERS TO CONFIRM ORDERS	E=NEWSPAPER - DAIL K=COMPANY WEBSITE
7=EMAIL CUSTOMERS AS PART OF MARKETING PROGRA	F=NEWSPAPER - WEEI L=KEY WORDS THRU SEARCH ENGINE

11.0 Appendix 2: User Testing Questionnaire

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Full Name _____

Address _____

City/ Town _____ State _____ Postal Code _____

Telephone Number _____ Date _____

Hello, my name is _____ from _____, an independent market research agency. May I please speak with (listed name) [IF NOT AVAILABLE, SCHEDULE CALL BACK] We are currently conducting interviews among business owners. Could you please spare some time to answer a few questions (or could we arrange a more convenient time later?) I am not trying to sell you anything and everything you say will be treated in the strictest confidence. Shall we continue? [IF AVAILABLE, CONTINUE. IF NOT AVAILABLE SCHEDULE CALL BACK]

1. How would you characterize your role when it comes to making advertising decisions for your business, especially selecting where and when to advertise?
(Read list and record)

A	I am the key decision maker	Continue
B	I am part of a small group that actually decides how to advertise	Continue
C	I'm part of a larger group that provides input into the decision-making process	Ask for appropriate person
D	I play only a very limited role in the selection process	Ask for appropriate person
E	I have no role at all	Ask for appropriate person

2. Which of the following best describe your role within your company?

- Owner/President/VP
- Business manager
- Marketing manager
- Other person responsible for marketing decisions
- Other

3. How do your customers get access to your products or services?

- Through a retail store(s) only
- Through an online site(s) only **[Terminate]**
- Through both a retail store and an online site
- Neither a retail store nor an online site **[Terminate]**

4. Which of the following best describes the type of customers or clients you serve? Read list and record

- Primarily consumers
- Primarily businesses **[Terminate]**
- To both consumers and businesses equally **[Terminate]**

5. What is the annual gross revenue of your business?

- Less than \$100,000 **[Terminate]**
- \$100,000 to less than \$250,000 **[Terminate]**
- \$250,000 to less than \$500,000 **[Terminate]**
- \$500,000 to less than \$1,000,000
- \$1,000,000 to less than \$2,500,000

- \$2,500,000 to less than \$5,000,000
- \$5,000,000 to less than \$10,000,000
- \$10,000,000 to less than \$25,000,000
- \$25,000,000 or more [Terminate]

6. How much does your company spend annual on all marketing (Including Yellow Pages, newspaper, search engines, etc.)?

- Less than \$5,000 [Terminate]
- \$5,000 to less than \$10,000 [Terminate]
- \$10,000 to less than \$25,000
- \$25,000 to less than \$50,000
- \$50,000 to less than \$100,000
- \$100,000 to less than \$500,000 [Terminate]
- More than \$500,000 [Terminate]

7. How many employees, including yourself, are employed at your business location?

- One (self)
- 2-5
- 6-10
- 11-24
- 25-99
- 100-499 [Terminate]
- 500 or more [Terminate]

8. If you could advertise on TV for about the same or less than radio or newspaper advertising, how likely would you be to advertise on TV?

- Very Likely
- Somewhat Likely
- Neither Likely nor Unlikely [Terminate]
- Somewhat Unlikely [Terminate]
- Very Unlikely [Terminate]

9. If you could get a customized TV commercial for \$500 and you could run TV ad campaign on cable networks of your choice for an additional \$1000, how likely would you be take advantage of such an offer?

Select one

- Very Likely
- Somewhat Likely
- Neither Likely nor Unlikely

- Somewhat Unlikely
- Very Unlikely

[HOLD] They may be on the fence and since it's a novel idea, they may just need to hear more about it to make a decision]
[Terminate]
[Terminate]

10. Which of the following activities do you currently do on the internet? (read list)
Select all that apply

- Buy personal items
- Buy items for my business
- Pay personal bills
- Pay business bills
- Email customers to confirm orders
- Email customers as part of a marketing program
- None of the above

[Terminate]

11. Which of the following do you currently use or have you ever used to advertise your business? [Must use more than just Yellow Pages]

[Read list; check all that apply]

	Ever Used	Currently use
Yellow Pages	_____	_____
Radio	_____	_____
Television - local network	_____	_____
Television – cable	_____	_____
Newspaper – daily	_____	_____
Newspaper – weekly	_____	_____
Local shopper	_____	_____
Direct mail	_____	_____
Magazines/Journals	_____	_____
Outdoor advertising (bus stops, billboards, flyers, etc.)	_____	_____
Company website	_____	_____
Key words through a search engine (Google, Yahoo!)	_____	_____

12. Which of the following categories includes your age? (Read list; circle one)

- Under 20 [Terminate]
- 20-24 [Terminate]
- 25-35
- 36-40
- 41-49
- 50-59
- 60-65 [Terminate]
- 65+ [Terminate]

13. On a scale of 1 to 10, will 1 being a novice and 10 being an expert, how would you describe your computer skills? (Circle one)

1 2 3 4 5 6 7 8 9 10

Terminate anyone who answers 1, 2, 3 or 4. All must be 5+ in computer literacy

14. What industry best describes your business?

(open ended) Recruit a mix

The reason for all these questions is that we would like to invite you to come to our facility at 6300 Wilshire Blvd (x-street Crescent Heights), sometime On October 26 to participate in a one-on-one interview. The interview will last approximately 60 minutes. We are only interested in eliciting your valuable in helping us test our new product. You will not be asked to buy anything. As an appreciation for your participation, we will provide you a token in the amount of \$125. May I reserve an interview time for you?

Yes 1
No 2 (Terminate)

- CONFIRM NAME, ADDRESS AND PHONE NUMBER
- PROVIDE DETAILS OF DATE, TIME AND LOCATION OF INTERVIEW.
- Parking will be validated
- Respondent should inform security that they are here to see Spot Runner and they will be escorted to the appropriate elevators

Date	Time

THANK YOU