

11 August 2011



▲ MyPMI User Testing Results  
PMI

## Agenda

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- ▲ Project Overview
- ▲ Results Summary
- ▲ Recommended Next Steps
- ▲ Appendix
  - ▲ Usability Recommendations (Details)
  - ▲ Future Recommendations (Details)



# Project Overview



## Project Objectives

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- ▲ Define key areas of opportunity to improve the MyPMI section of the PMI.org site
- ▲ Gain insights into challenges and opportunities related to the MyPMI re-design
- ▲ Understand the needs and desires of the MyPMI end users



## Testing Approach

The usability testing exercise consisted of 20-1 hour long sessions July 21<sup>st</sup>-27<sup>th</sup> reviewing:

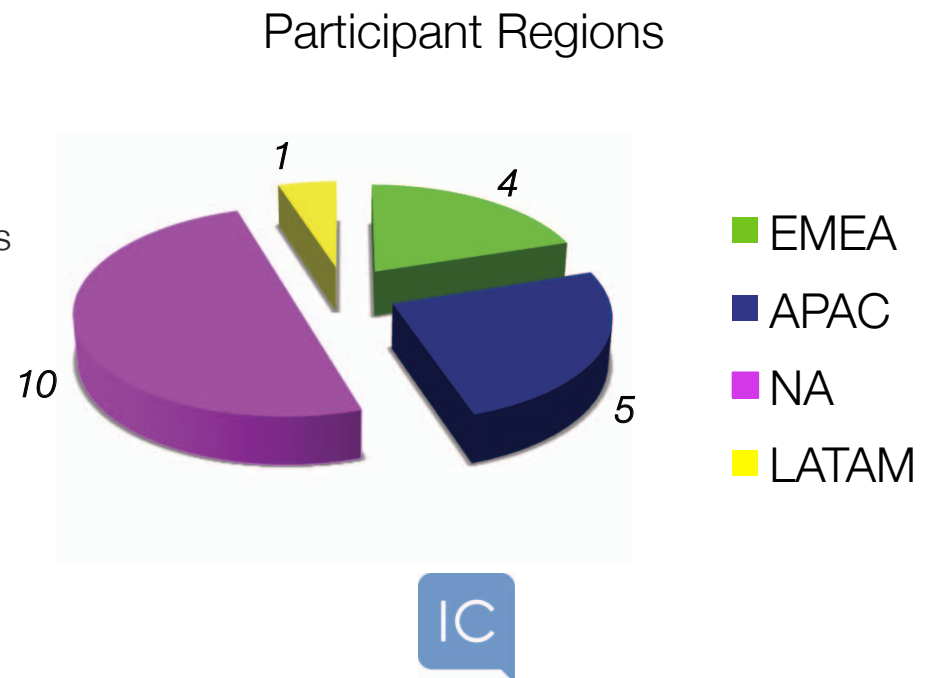
- ▲ Overall Perception of re-designed MyPMI Dashboard page
- ▲ Ease of task completion including:
  - ▲ Updating Profile Information (uploading photo, editing company info, updating communication preferences)
  - ▲ Identifying how to renew both membership and certifications
  - ▲ Identifying number of PDUs applied to a certification
  - ▲ Finding an event in the event widget
  - ▲ Finding articles and papers associated with Knowledge area topic
  - ▲ Accessing the orders area to view the digital library, recent orders, and changing saved payment information
  - ▲ Adding a Community of Practice
  - ▲ Updating Membership Publication Preferences



## Participant Make-Up

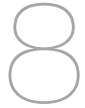
The testing exercises were conducted with 20 PMI members with the following characteristics:

- 90% have a PMI certification, are defined as active in PMI, and visit the website at least once a week
  - Of that 90% that have a certification, all have a PMP and one also had a PMISP
- 90% visit the PMI.org site weekly
  - Of the 10% that visit the site less than weekly, 5% visit the site several times a year and the other 5% visit the site once or twice a year
- When visiting PMI.org,
  - 30% access MyPMI every time
  - 10% access it 75% of the time
  - 5% access it 50% of the time
  - 55% access it 25% of the time or less



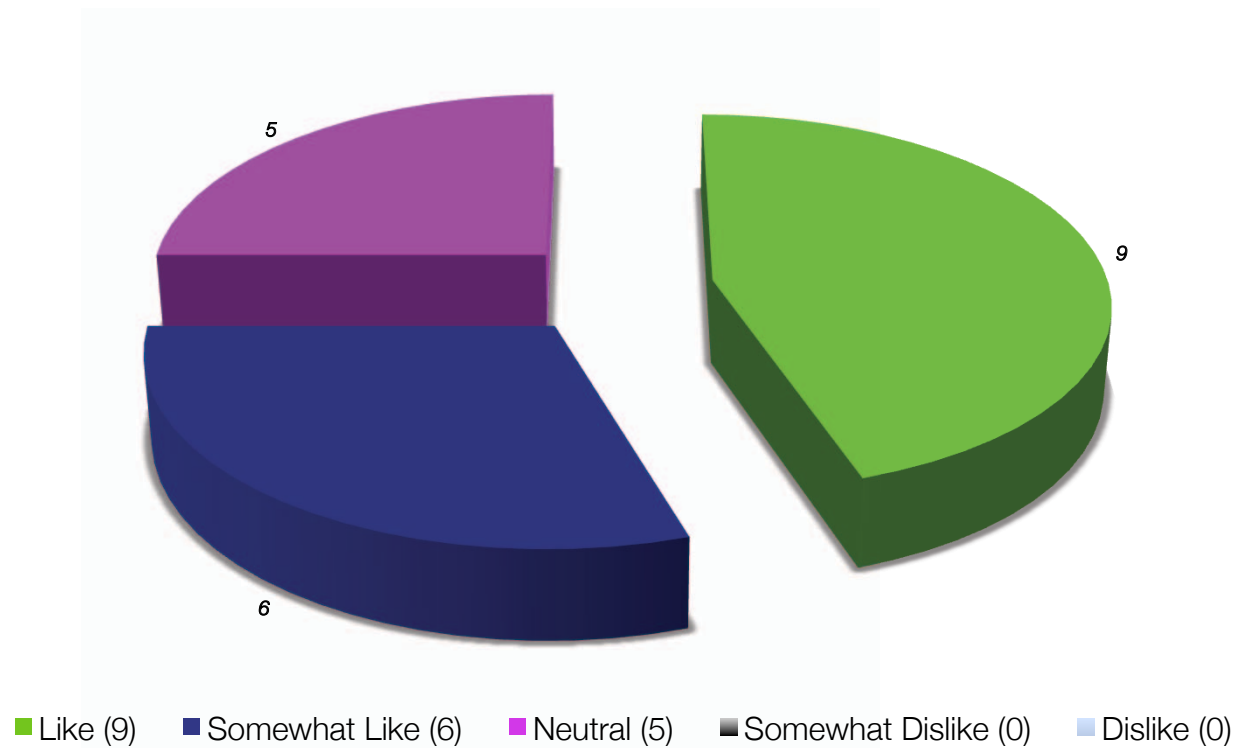
# Results Summary





Members are happy with the re-design of the MyPMI section of the PMI.org site. As one participant noted: “Compared to the original one, it is excellent.”

User Rating of the Re-Design



"Quite informative"

"a lot better, more info available"

"really like it"

"easy to read"

"surprised to see something [subscribing to CoPs] so easy on PMI."

"easy on the eye"

"It *could* become a very important tool [to keep members tied to PMI]."

## The Participants Said It Best...

"room for improvement, growth"

"heading in the right direction"

"not wowing me but nor am I kinda going 'yuck'."

"one of the primary reasons someone goes to PMI is to connect"

"Besides the knowledge area, love it"

"a lot of potential"

"thought MyPMI would be about social networking... and networking with members."



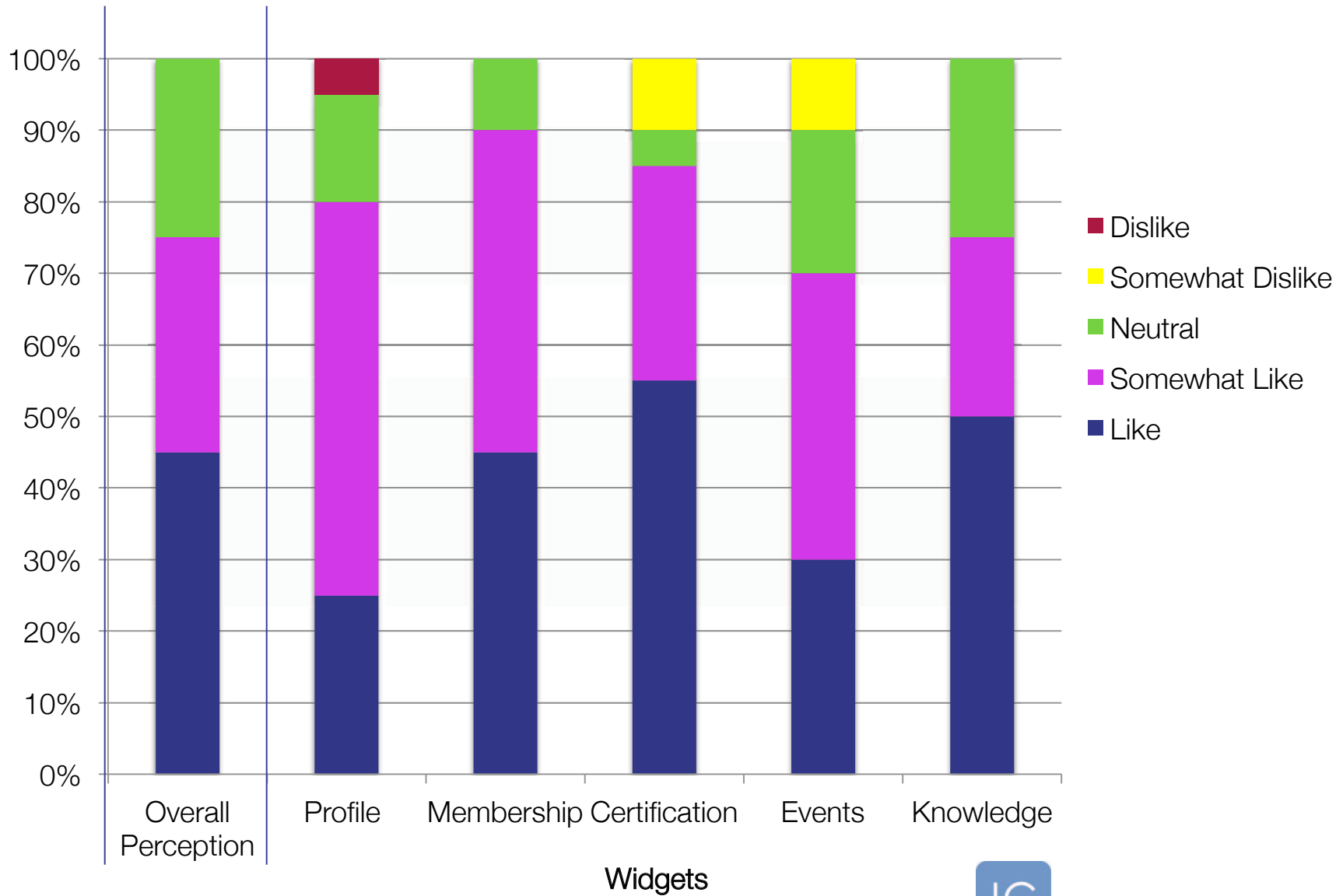
## Results Summary >> Dashboard Perception

The Dashboard for the MyPMI section is the center of the participant's experience and has the potential to be very valuable.

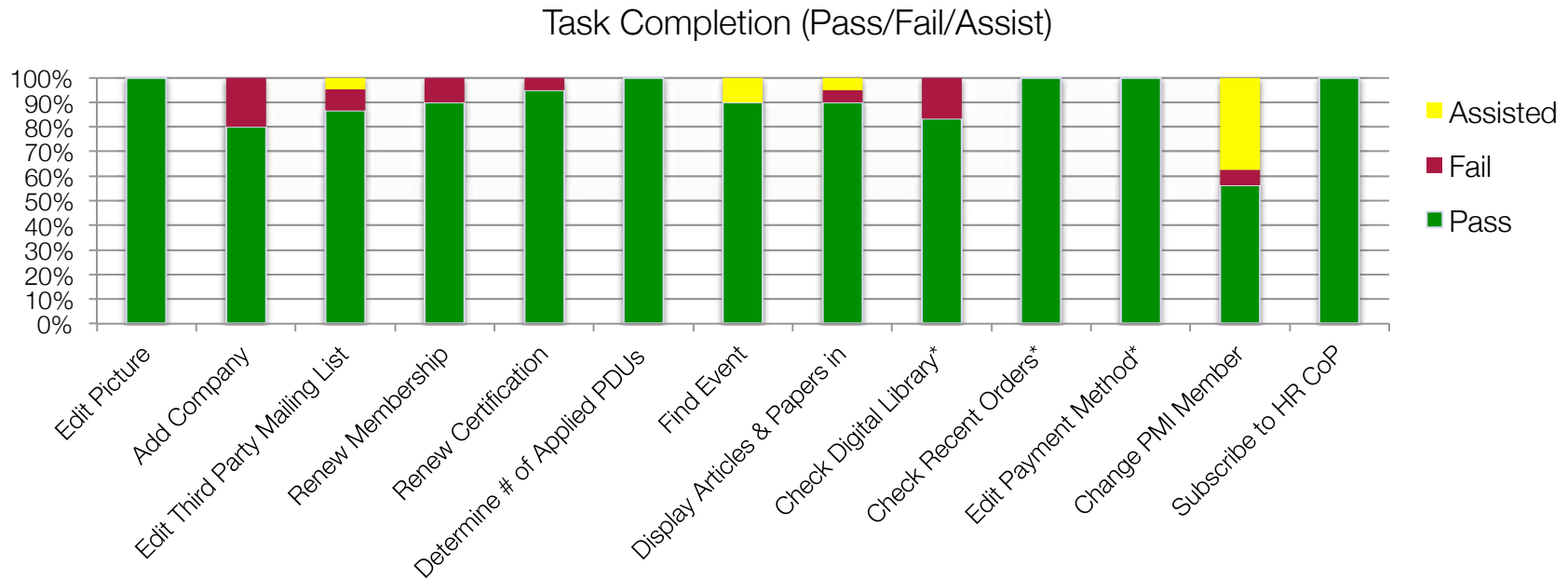
- ▲ The Membership and Certification widgets are the MOST valuable sections of the page but received lower marks due to some usability issues. One participant noted that the certification widget is "Quite good...it was awful before."
- ▲ The Profile Widget is not considered valuable unless it represents the participants' public profile; the rating is based upon an expectation that this information becomes a public profile. 50% of participants specifically noted that if this area of the page is only for personal use, then it is not relevant to their needs.
- ▲ The Events widget has the most potential of all of the widgets if it provides users with all relevant events. One participant noted that "that one piece of information [events relevant to me] could make people come here"
- ▲ The Knowledge section created a lot of confusion for users initially and therefore, they could not accurately determine its value. This widget will be valuable to some users but, as one participant pointed out, "50% of this page is not mine anymore."



# Results Summary >> Dashboard Perception



## Results Summary >> Task Completion (Pass/Fail/Assist)

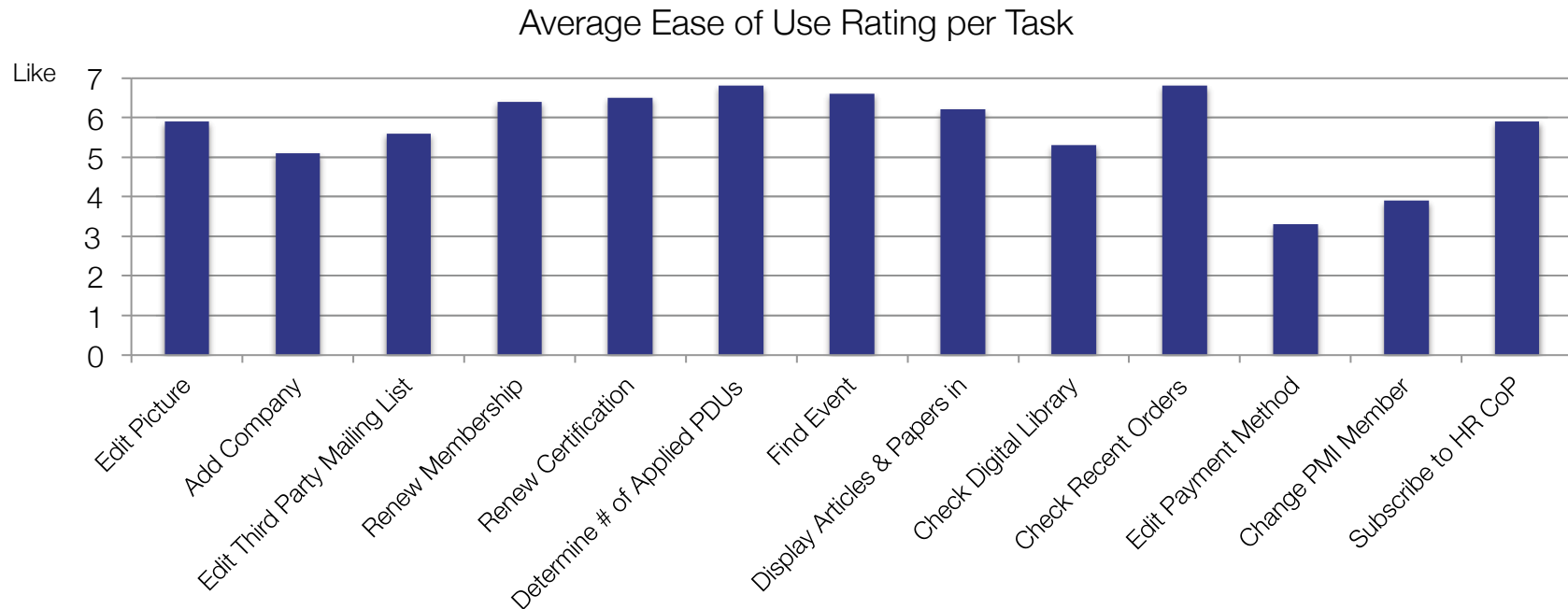


- Five (5) tasks had 100% success rates: Edit Picture, Determining Applied PDUs, Check Recent Orders, Edit Payment Method, and Subscribe to HR CoP
- Changing PMI Member Publication Preferences was the least successful task with only 56% of participants passing

NOTE: These percentages are based upon the # of participants that attempted to complete the task on the site and does not always include all 20 participants



## Usability Recommendations >> Task Ease Rating



- ▶ Note that even though users completed some tasks with relative success, they received slightly lower ease of use scores due to usability issues
  - ▶ For Example: though all those that edited their payment method completed the task successfully, they still perceived the task as hard due to its location in the Orders tab

NOTE: These averages are based upon the # of participants that first completed and then rated the task and does not always include all 20 participants



## Results Summary >> Recommendations

The testing sessions provided a lot of valuable feedback at many different levels. By combining the task completion data, the ease of completion ratings, observations, and the overall feedback, we have identified two types of recommendations:

- ▲ Current State Usability Recommendations
  - ▲ Directly related to task completion, ease of use rating, and observations
  - ▲ Focused on changes to improve the overall usability of the current state of the site
  
- ▲ Future State Recommendations
  - ▲ Based upon overall feedback and discussion throughout the testing exercise
  - ▲ Focused on larger themes learned during the sessions with the goal of informing a future state of the MyPMI site



## Results Summary >> Current State Usability Recommendations

There were some usability issues that hindered participant success when completing tasks. The following changes will improve the usability of the current state of the site:

- ▲ Streamline and re-organize navigation (secondary & tertiary) to improve findability
- ▲ Anchor links to the most relevant area of the page to which they are navigating
- ▲ Add visual differentiation between calls to action and general links
- ▲ Reduce the amount of text throughout the site to only the most necessary information
- ▲ Provide contextual help throughout the site
- ▲ Provide feedback to the user that any actions taken have been successful (e.g. successful save)
- ▲ Provide only one save button per page (or allow both save buttons to save all information)
- ▲ Provide opportunities to present an even more personalized experience (it's the little things)



## Results Summary >> Future State Recommendations

The PMI participants are very engaged with the organization and want to see PMI provide more value in their online experience. Some recommendations for the future revolve around the following:

- ▲ Provide more relevant and personalized experiences than currently offered (e.g. relevant events)
- ▲ Provide a more integrated experience by:
  - ▲ Making the participants' involvement with PMI through communities more prominent throughout the experience
  - ▲ Supporting a social media-like, networking experience for members to interact and collaborate



# Recommended Next Steps



## Recommended Next Steps

### PMI

- ▲ Address usability issues as soon as possible
- ▲ Create stop-gap solutions to larger design problems

### Intuitive Company

- ▲ Provide re-design concepts for each page tested in the site to articulate the recommended changes
- ▲ Conduct another round of testing on the updated site and the re-design screens



# Appendix:

A. Detailed Usability Recommendations

B. Detailed Future State Recommendations



# A. Detailed Usability Recommendations



## Usability Recommendations >> Summary

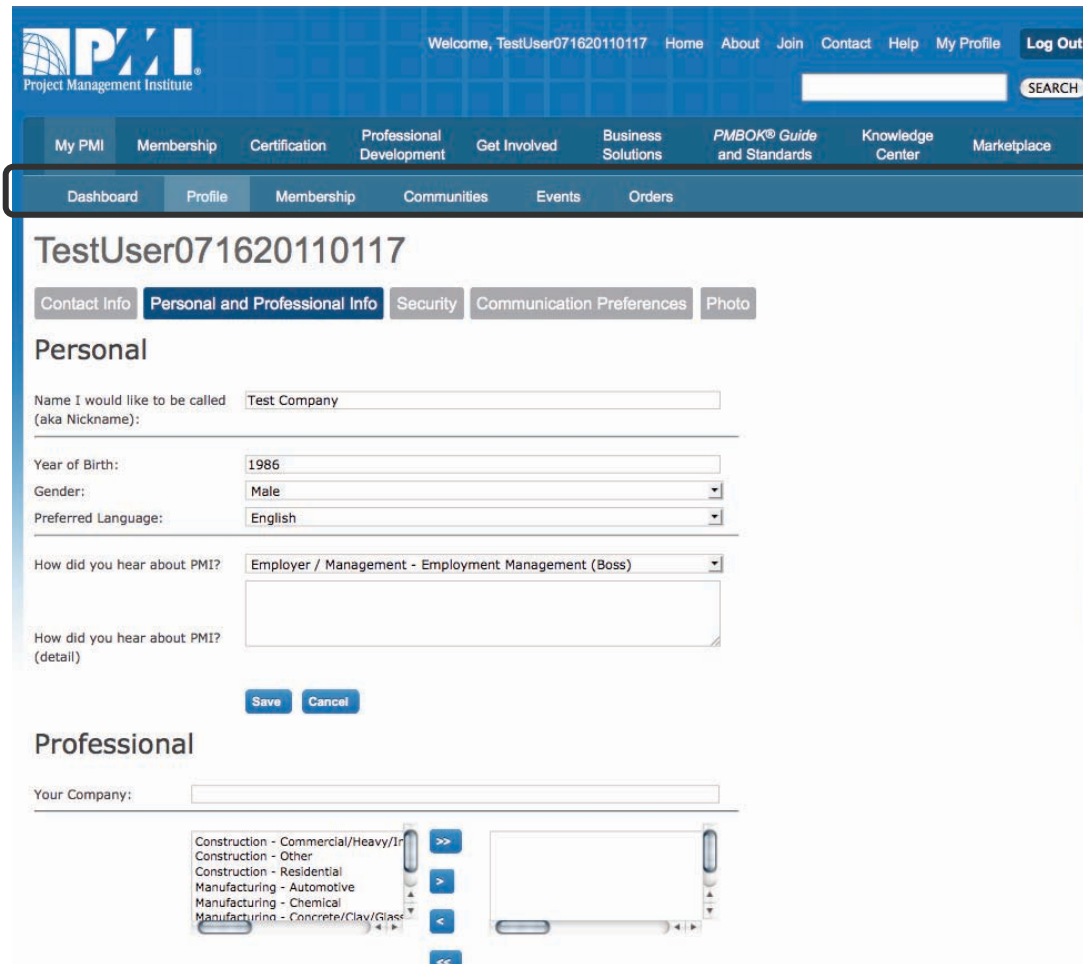
The following changes will improve the usability of the current state of the site and greatly improve the users' perception of the site:

- ▲ Streamline and re-organize navigation (secondary & tertiary) to improve findability
- ▲ Anchor links to the most relevant area of the page to which they are navigating
- ▲ Add visual differentiation between calls to action and general links
- ▲ Reduce the amount of text throughout the site to only the most necessary information
- ▲ Provide contextual help throughout the site
- ▲ Provide feedback to the user that any actions taken have been successful (e.g. successful save)
- ▲ Provide only one save button per page (or allow both save buttons to save all information)
- ▲ Provide opportunities to present an even more personalized experience (it's the little things)



# Usability Recommendations >> Secondary Navigation

Streamline and re-organize navigation (secondary & tertiary) to improve findability



## Design & Layout

Users did not immediately recognize the secondary navigation during testing.

### Recommendations:

- Add more contrast between the PMI.org and MyPMI (secondary) navigation to make the MyPMI section stand out more
- Make the highlighted state of each (Primary & Secondary) navigation bar stand out more

## Categorization/Naming

Once the secondary navigation was noticed, users had a hard time determining the difference between what information would live in the Profile area and the Membership area. In fact only 56% of users passed (many with multiple attempts) at finding the Member Publications Preferences in the member tab. They expected to find it in Profile>Communication Preferences. Also, users were confused by the content/functions they found in the Orders section.

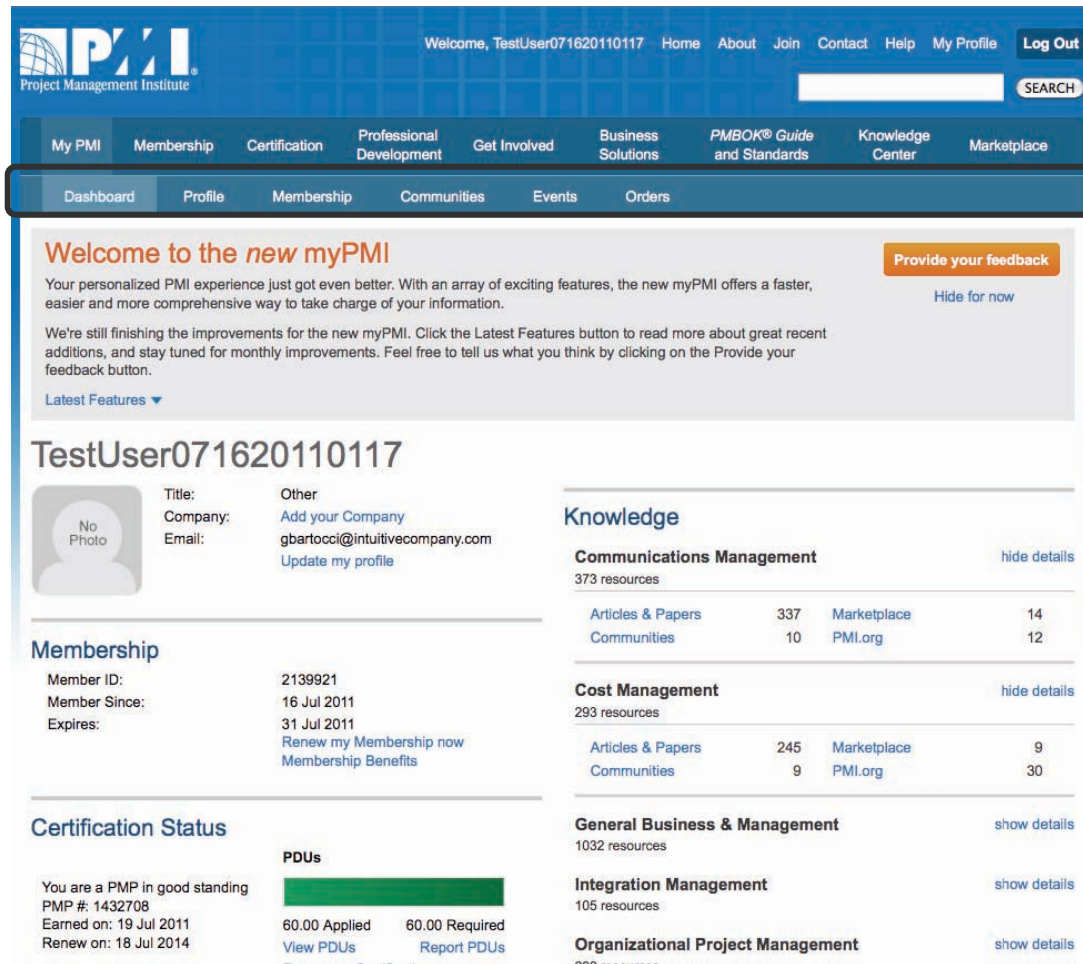
### Recommendations:

- Remove the membership tab and move the content within it to recommended areas (noted in tertiary navigation)
- Remove the Digital Library from the Orders navigation and create a new secondary navigation category for it
- (Optional) Place the saved credit card information in the personal information with the Profile (or cross-link)
- Either include the Knowledge area in the Secondary navigation or treat it differently on the dashboard page



# Usability Recommendations >> Secondary Navigation

Streamline and re-organize navigation (secondary & tertiary) to improve findability



## Dashboard Organization

Users expected that the different widgets on the dashboard would represent a summary of the information in the secondary navigation (common practice). The lack of knowledge tab and any representation of orders in the dashboard caused some confusion.

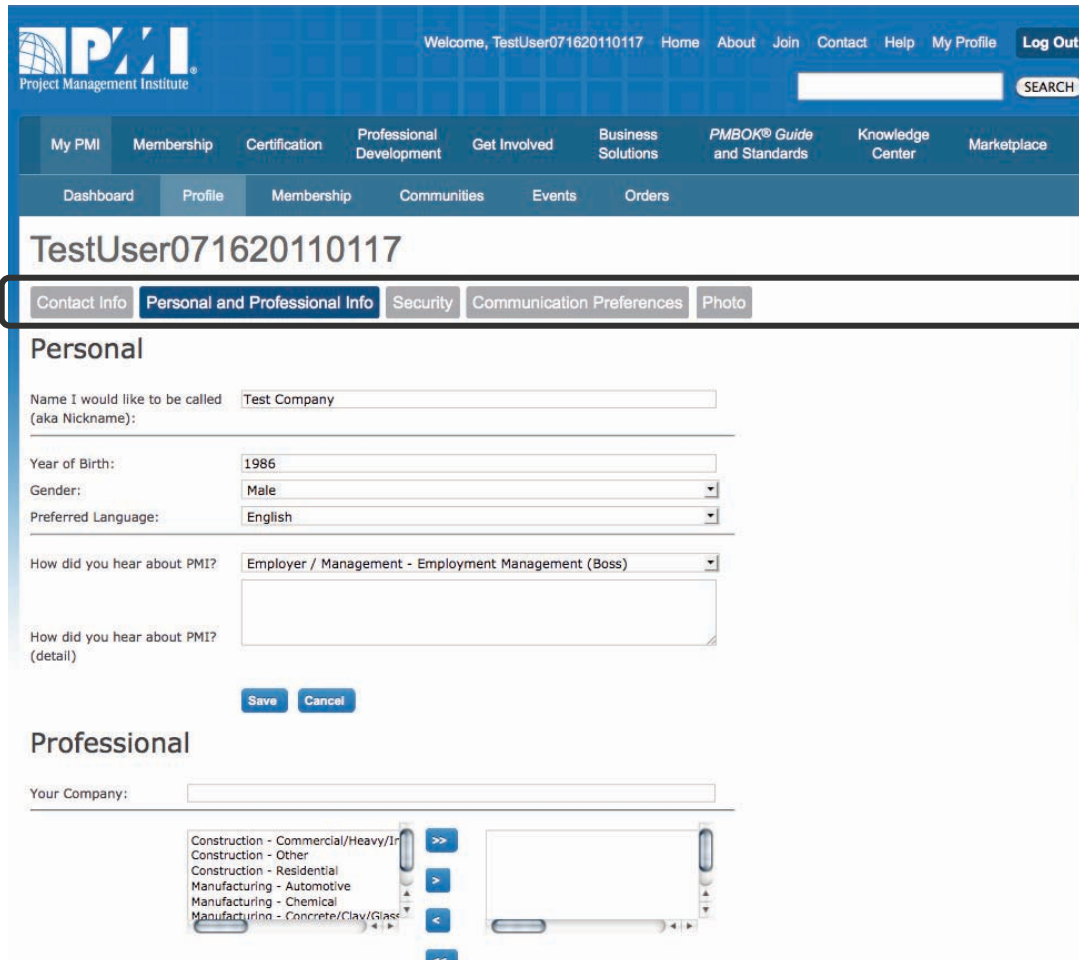
### Recommendations:

- Include all major categories from the secondary navigation in some summary form on the dashboard
- Any sections/widgets that are not included in the secondary navigation should be treated differently (visually) on the dashboard page



# Usability Recommendations >> Tertiary Navigation

Streamline and re-organize navigation (secondary & tertiary) to improve findability



## Design & Layout

Users did not immediately recognize or understand the tertiary navigation in the Profile section during testing. Also, the inconsistency of the layout and design across the secondary and tertiary navigation made it hard to find information when navigating.

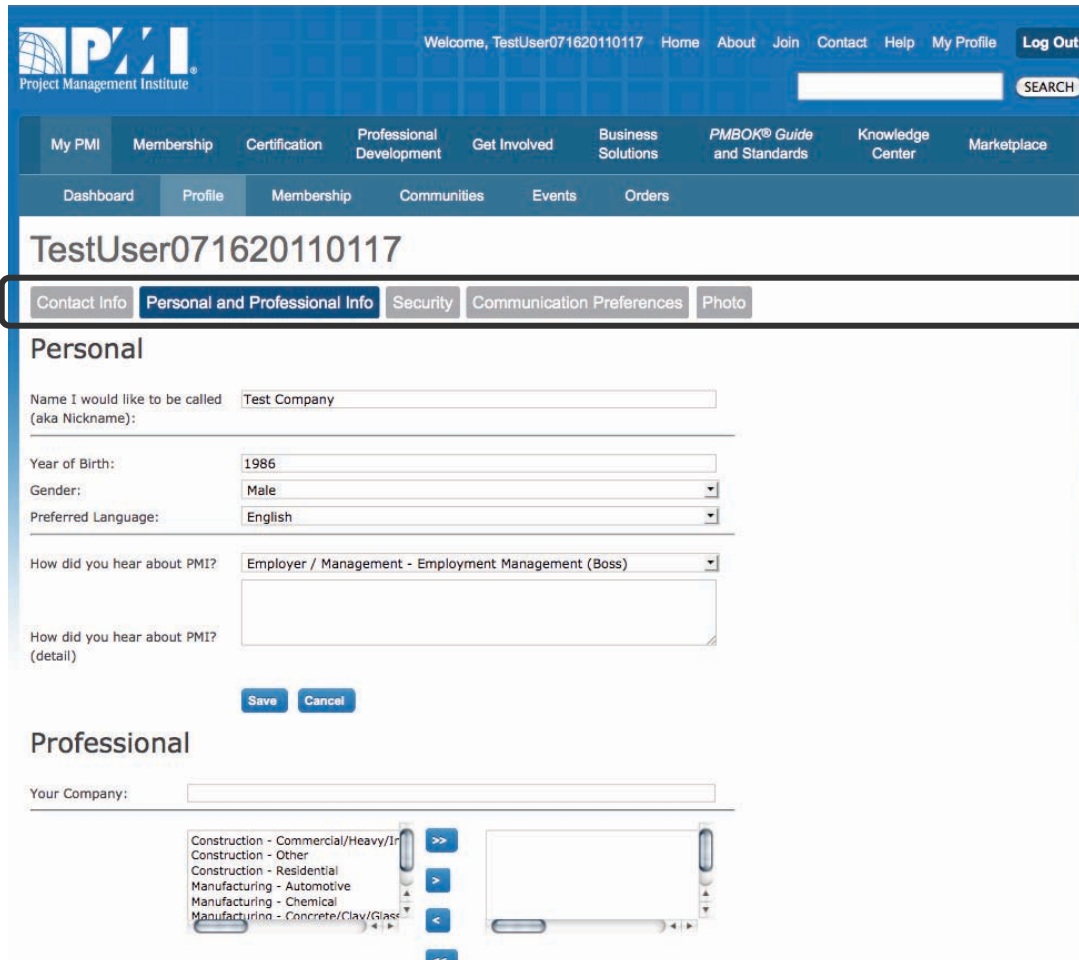
### Recommendations:

- Include dropdowns of the tertiary navigation within each secondary navigation category
- Provide access to the tertiary navigation via a common left hand navigation or move the tertiary navigation above the page header
- Make the page layout consistent across secondary and tertiary navigation landing pages including utilizing the full width of the page
- Increase the size of data fields and labels throughout the site
- Consider including a link to the Marketplace in the Orders tab



# Usability Recommendations >> Tertiary Navigation

Streamline and re-organize navigation (secondary & tertiary) to improve findability



## Categorization/Naming

Users felt that the categories provided in the tertiary navigation were not always clear to them with the exception of Security and Photo. Also, some sections like the Orders & Communities section did not include a tertiary navigation which is warranted.

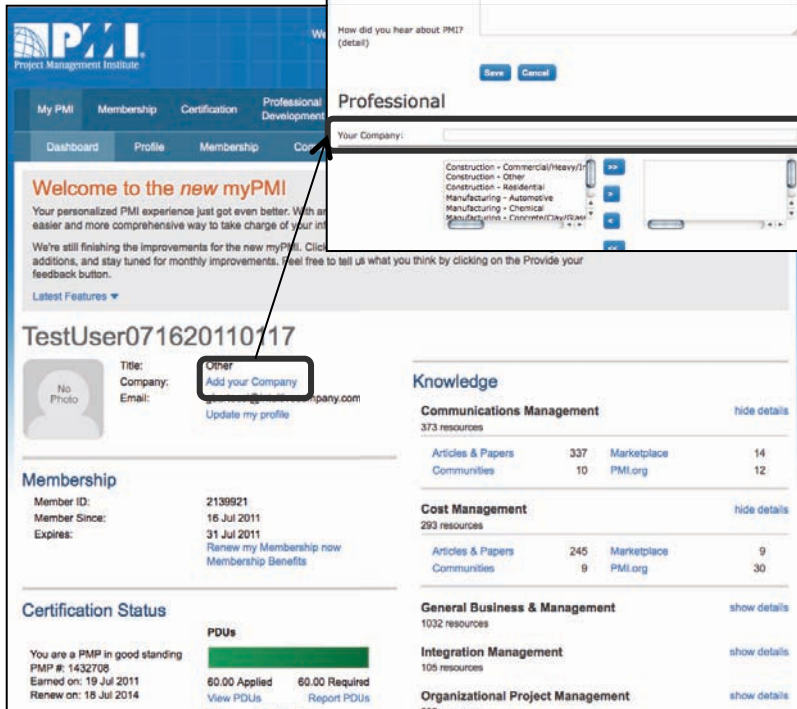
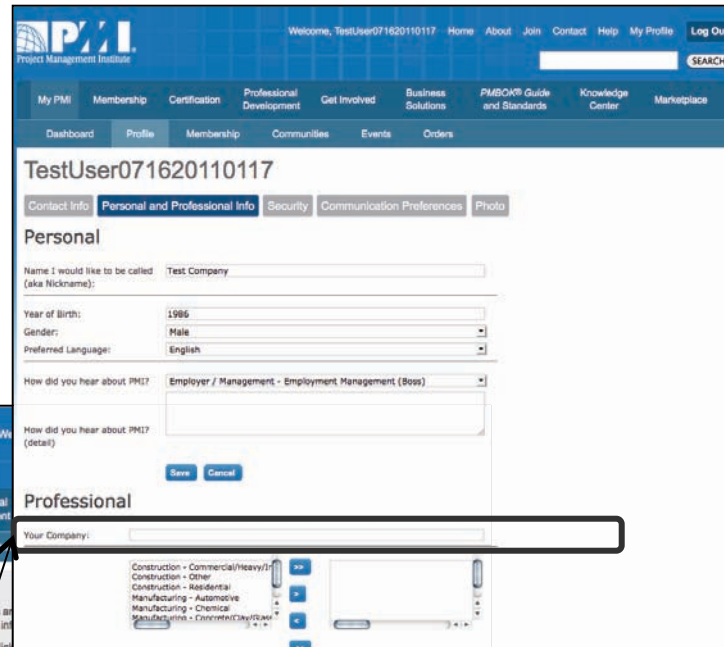
### Recommendations:

- Move the Membership tab information into the Profile section as its own tertiary navigation tab
- Remove the Member Publications Preferences from Membership and place in Communication Preferences
- Make Personal Information its own tab and place the personal contact info into this section
- Make Professional Information its own tab and place the relevant contact information in this tab
- Provide tertiary navigation under Communities for Chapters and CoPs ( and hopefully things like volunteer opportunities in the future)
- Remove Digital Library from Orders tab (see Secondary Navigation Recommendations) and create a tertiary navigation for Recent Orders and Saved Credit Card Information



# Usability Recommendations >> Link Navigation

Anchor links to the most relevant area of the page to which they are navigating



Users expected that links used to access other areas of the site (especially from the dashboard) would be anchored to the exact location. Examples of links that did not do this effectively were: Add A Company, Digital Library, and Renew Certification links from the Dashboard.

## Recommendations:

- Navigate a user directly to the field or area of the site relevant to the specific link selected
  - Add a Company: Link the user to the correct page of the site with the Company field at the top of the page and the cursor in that field
  - Digital Library: Link the user to the correct page with the Digital Library at the top of the screen
  - Renew Certification: Link the user to the correct page with the correct certification type (in testing, PMP) at the top of the page
- Consider the use of lightboxes for very specific data and informational input (e.g. Add Company)



# Usability Recommendations >> Calls to Action

Add visual differentiation between calls to action and general links

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The screenshot shows the MyPMI dashboard for user TestUser071620110117. The top navigation bar includes links for Home, About, Join, Contact, Help, My Profile, and Log Out. Below this is a search bar and a secondary navigation bar with categories like My PMI, Membership, Certification, Professional Development, Get Involved, Business Solutions, PMBOK® Guide and Standards, Knowledge Center, and Marketplace. A third navigation bar lists Dashboard, Profile, Membership, Communities, Events, and Orders. The main content area features a welcome message, a 'Provide your feedback' button, and a 'Latest Features' dropdown. The user's profile section shows their name, a placeholder for a photo, and contact information. The 'Membership' section displays the member ID, start date, and expiration date, with a highlighted 'Renew my Membership now Membership Benefits' link. The 'Certification Status' section shows the user's PMP status and PDU requirements. The 'Knowledge' section lists various resource categories with counts and links to 'show details'.

The large variety of links on the dashboard (and throughout the experience) makes it hard for a user to see those items that most important like "Renew."

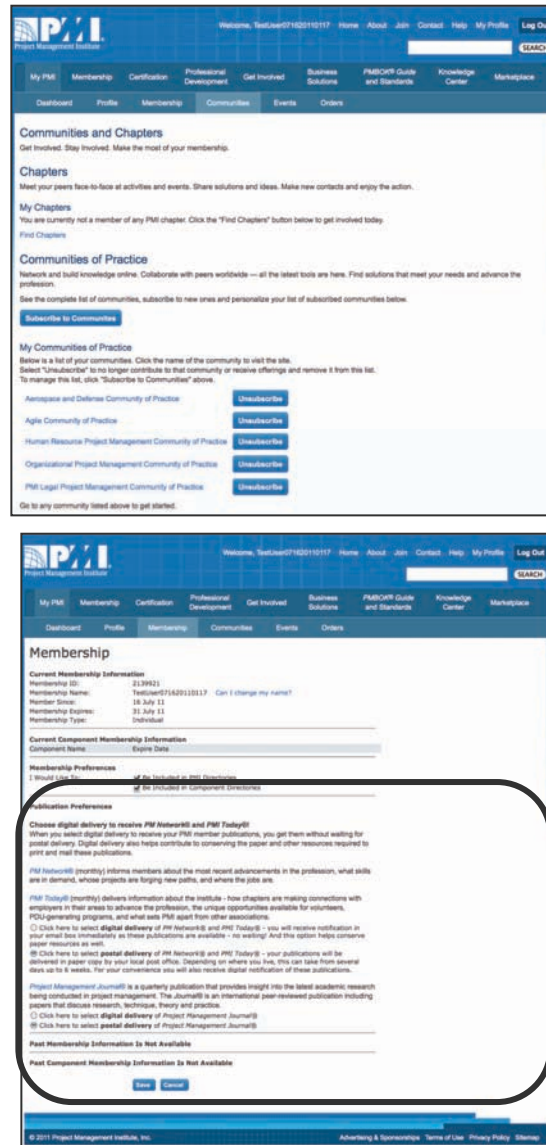
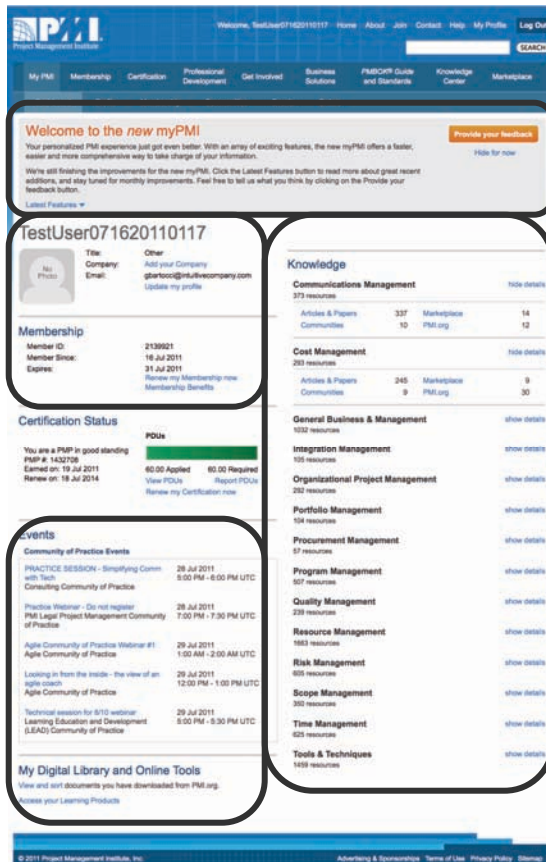
## Recommendations:

- Ensure that the renew membership & renew certification link only shows when time to renew (and not otherwise)
- Make the renew membership link stand out more as if an alert to the users
- Provide notification links when new member benefits arise or as a reminder as a new member joins the group; otherwise, remove the link to the membership benefits otherwise
- Move general links to edit information to the top right of the widget (e.g. Update My Profile)



# Usability Recommendations >> Content

Reduce the amount of text throughout the site to only the most necessary information



Users were consistently overwhelmed by the amount of text throughout the site requiring them to pay close attention and read rather than scan to complete tasks.

## Recommendations:

- Provide more opportunities for visual display of information
- Reduce the amount of text wherever possible
- *Ideal but might not be possible in the current state:* Reduce the knowledge area to an advanced search field that includes filters on the Knowledge areas and the search type (Articles & Papers, etc)
- Include icons to represent the knowledge areas within the Knowledge section of the dashboard and to distinguish between the types of events available
- *Ideal but might not be possible in the current state:* Remove the welcome message completely and prompt the user with a welcome message pop-up first time they log-in with option to determine not to see it again
- Be consistent in the use of subscription buttons across chapters and communities
- Combine the profile and membership information on the dashboard into one section that uses less total real estate
- Remove the membership benefits link (on dashboard) unless there is something new there
- Provide a more consistent and clearer typographical hierarchy across the site



# Usability Recommendations >> Contextual Help

Provide contextual help throughout the site

**Knowledge**

Category	Resources	Marketplace	PMI.org
<b>Communications Management</b>	373 resources		
Articles & Papers	337	14	
Communities	10		12
<b>Cost Management</b>	293 resources		
Articles & Papers	245	9	
Communities	9		30
<b>General Business &amp; Management</b>	1032 resources		
<b>Integration Management</b>	105 resources		
<b>Organizational Project Management</b>	292 resources		
<b>Portfolio Management</b>	104 resources		
<b>Procurement Management</b>	57 resources		

Users had trouble understanding the value in specific areas of the site, especially the Knowledge Widget, the Digital Library widget, and the Orders section of the site (specifically the Digital Library). They also had lack of clarity around what information was actually being presented in certain areas (e.g. the Events and Profile widgets). There were also a few labels that were unclear to users (e.g. Earned On and Renew On in Certification widget)

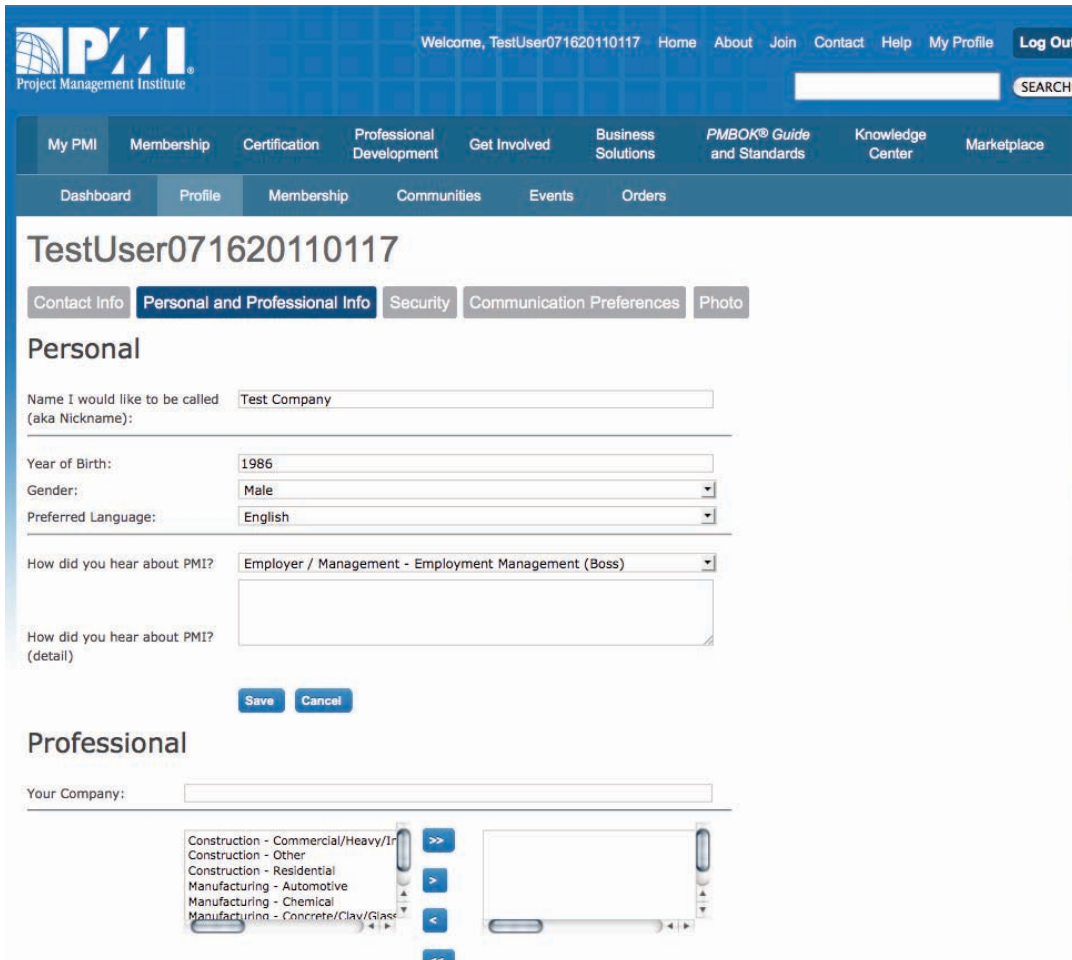
**Recommendations:**

- Provide the “What’s This” icon (question mark in a circle) at adjacent to the title headers throughout the site defining those sections for the user including definitions of specific content on the page
- Limit additional text within the page explaining features unless absolutely necessary (see Content Usability Issue)



# Usability Recommendations >> System Feedback

Provide feedback to the user that any actions taken have been successful (e.g. successful save)



Throughout the testing exercise, users had to complete tasks that required them to select a button to complete their action. Upon clicking these buttons, there was NO system feedback to the user letting them know that they had completed that task successfully.

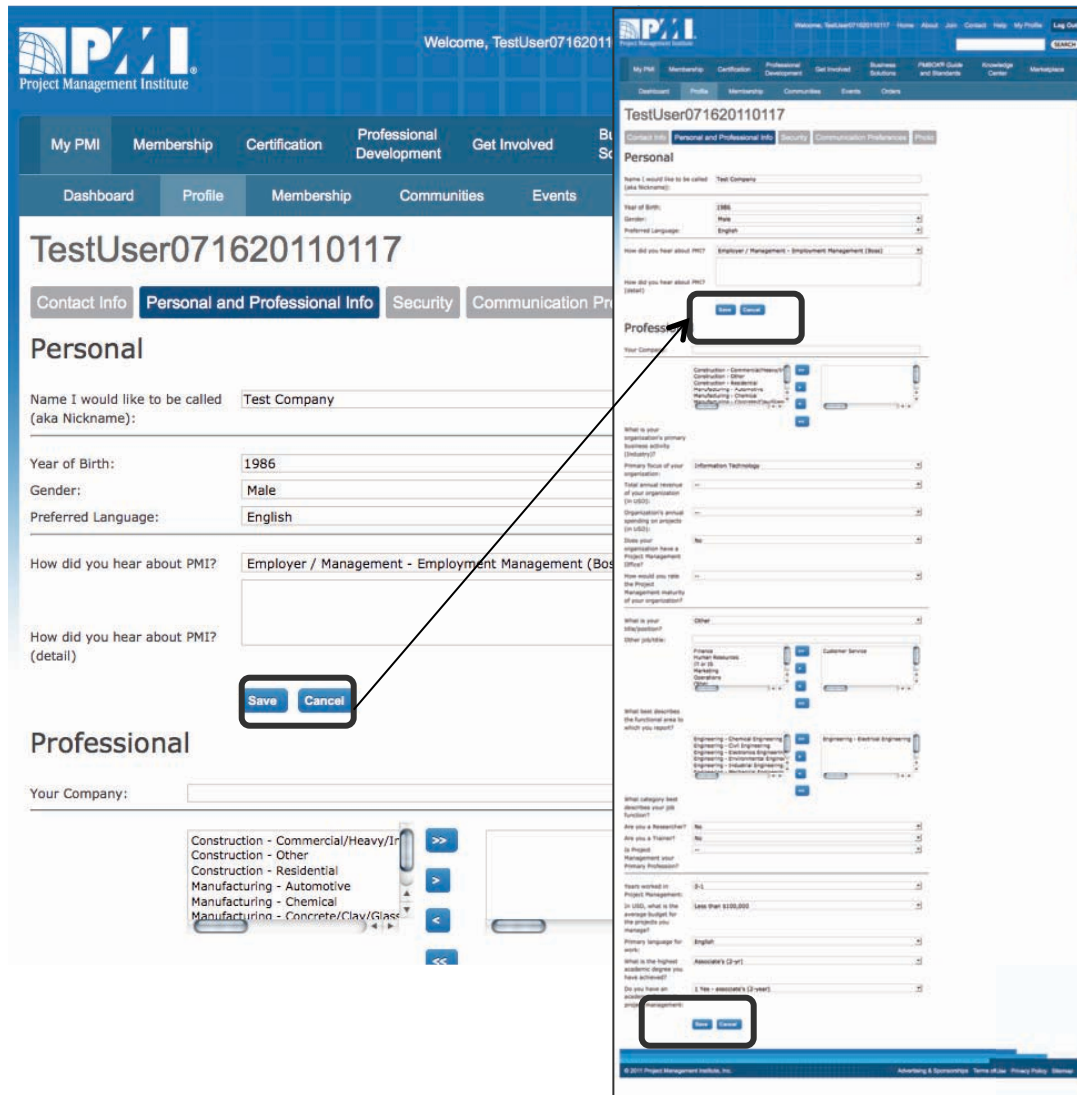
## Recommendations:

- Provide a notification at the top of each page (once saved) noting that their settings were successfully saved
- Personalize the saved language to each specific task so the user knows what specifically has been saved



# Usability Recommendations >> Save Buttons

Provide only one save button per page (or allow both save buttons to save all information)



When saving profile information, users encountered multiple save buttons on certain pages, which caused confusion. This was mostly observed when a user tried to add their company name; many of the users selected the top save button which then did not save their company information. Of those that did that, some recognized that it did not save by viewing the dashboard and then returned and decided to use the save on the bottom. NOTE: Some of the changes suggested for the navigation may address some of the saving issues.

### Recommendations:

- Provide a save/cancel button at both the top and the bottom of the page that will save all edited information



# Usability Recommendations >> Personalization & Saved Settings

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Provide opportunities to present an even more personalized experience (it's the little things)

The screenshot shows the MyPMI user profile page for TestUser071620110117. The page has a blue header with the PMI logo and navigation links. Below the header is a search bar and a navigation menu. The main content area is divided into several sections: a welcome message, user profile information, membership details, certification status, and knowledge resources. Annotations include a box around the 'Hide for now' button in the welcome message, a box around the 'hide details' button for Communications Management, and a box around the 'show details' button for General Business & Management.

**Welcome to the new myPMI**

Your personalized PMI experience just got even better. With an array of exciting features, the new myPMI offers a faster, easier and more comprehensive way to take charge of your information.

We're still finishing the improvements for the new myPMI. Click the Latest Features button to read more about great recent additions, and stay tuned for monthly improvements. Feel free to tell us what you think by clicking on the Provide your feedback button.

Latest Features ▾

**TestUser071620110117**

**Membership**

Member ID: 2139921  
Member Since: 16 Jul 2011  
Expires: 31 Jul 2011  
[Renew my Membership now](#)  
[Membership Benefits](#)

**Certification Status**

**PDU's**

You are a PMP in good standing  
PMP #: 1432708  
Earned on: 19 Jul 2011  
Renew on: 18 Jul 2014

60.00 Applied    60.00 Required  
[View PDU's](#)    [Report PDU's](#)

**Knowledge**

**Communications Management** (373 resources) [hide details](#)

Articles & Papers	337	Marketplace	14
Communities	10	PMI.org	12

**Cost Management** (293 resources) [hide details](#)

Articles & Papers	245	Marketplace	9
Communities	9	PMI.org	30

**General Business & Management** (1032 resources) [show details](#)

**Integration Management** (105 resources) [show details](#)

**Organizational Project Management** (202 resources) [show details](#)

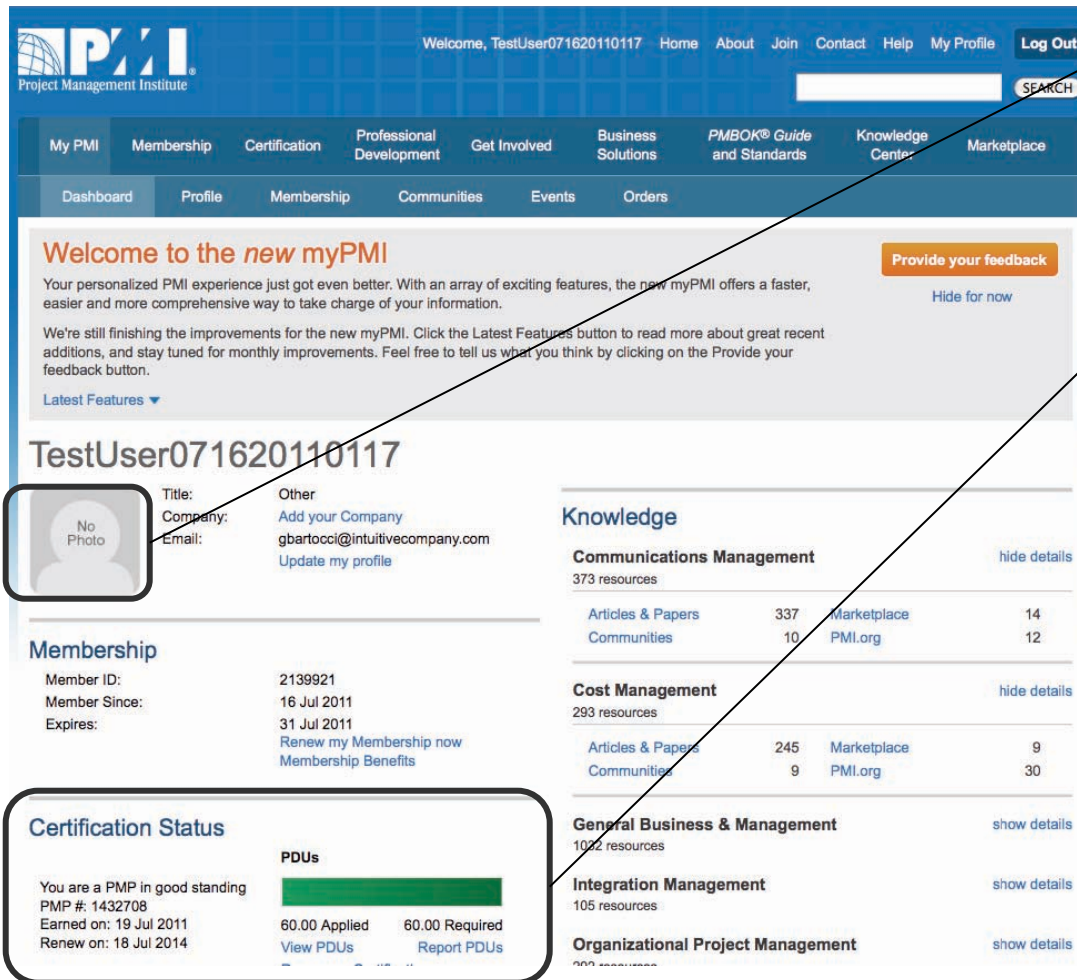
Users noted that this is "MY (emphasis on My) PMI" so the site should remember me and what I have selected. There are some personalization features that are small and should be handled now; please see the future state recommendations for more recommendations for personalization.

## Recommendations:

- [If Welcome Message is not a pop-up at login] Save the selected state of the message, e.g. if user selects to hide, maintain that selection even after navigating away and returning to the site
- Save the state of the Knowledge Areas (e.g. hidden details or shown details)



# Usability Recommendations >> Miscellaneous



## Edit Photo (Link in Photo)

Seven (7) of the 19 users that added a photo used the Edit Photo link within the photo. Four (4) of those 7 expected that they could click on the entire photo to navigate to an edit area and not have to select only that link.

### Recommendations:

- Allow the users to click on the photo edit

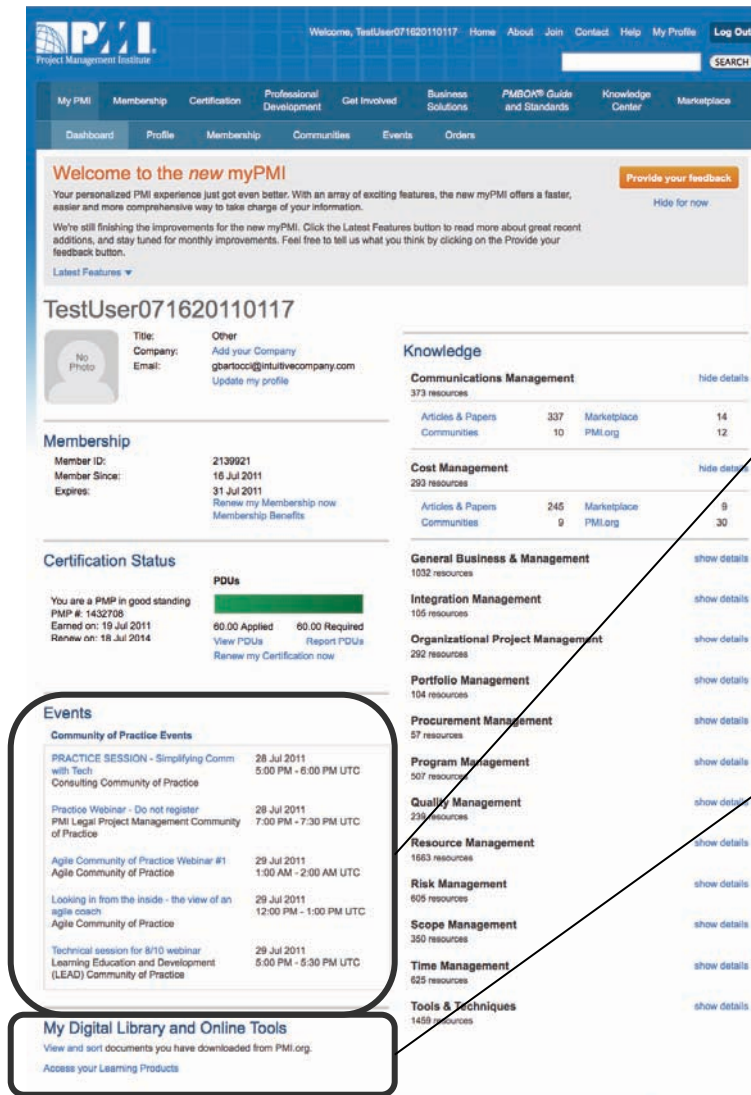
## Certification Widget Language & Layout

The Renew on and Earned on fields were slightly confusing to users. The PDU status bar merges with the certification information on the left side of the widget making the bar confusing initially for participants. The use of "60.00 Required" was confusing to participants; they want this bar to represent what is applied and what is left of the total # required.

### Recommendations:

- Re-organize the section to bring clarity to the PDU bar by placing the PDU bar below the certification information or creating some sort of visual break between the two sets of information
- Be sure to include all certifications that a user may have in this certification widget





## Events Widget

Users also want to be able to access more than 5 events and to be able to sort/filter these events accordingly. They also want to know where the location will take place to accurately make a decision about their ability to attend.

### Recommendations:

- Include a scrollbar for quick view capabilities
- Allow the users to sort, filter, and search the events
- Provide the location of the event (e.g. physical location or webinar) to help them decide if they could event attend

## Digital Library & Online Tools Widget

The Digital Library and Online Tools widget got lost on the page for the users. Once they did see it, many used it to navigate to the Digital Library for that particular task. Yet users were still not clear what the Library was or what the learning tools link meant.

### Recommendations:

- Make the Digital Library more prominent on the page
- Show the first few digital library items in the widget
- Create a separate section for the learning materials
- Rename the Learning Materials link to PMI Learn or if it includes more learning tools than PMI Learn, then at least indicate that it includes PMI Learn



# B. Detailed Future Recommendations



## Future State Functionality Recommendations

The PMI participants are very engaged with the organization and want to see PMI provide more value in their online experience. Some recommendations for the future involve the following:

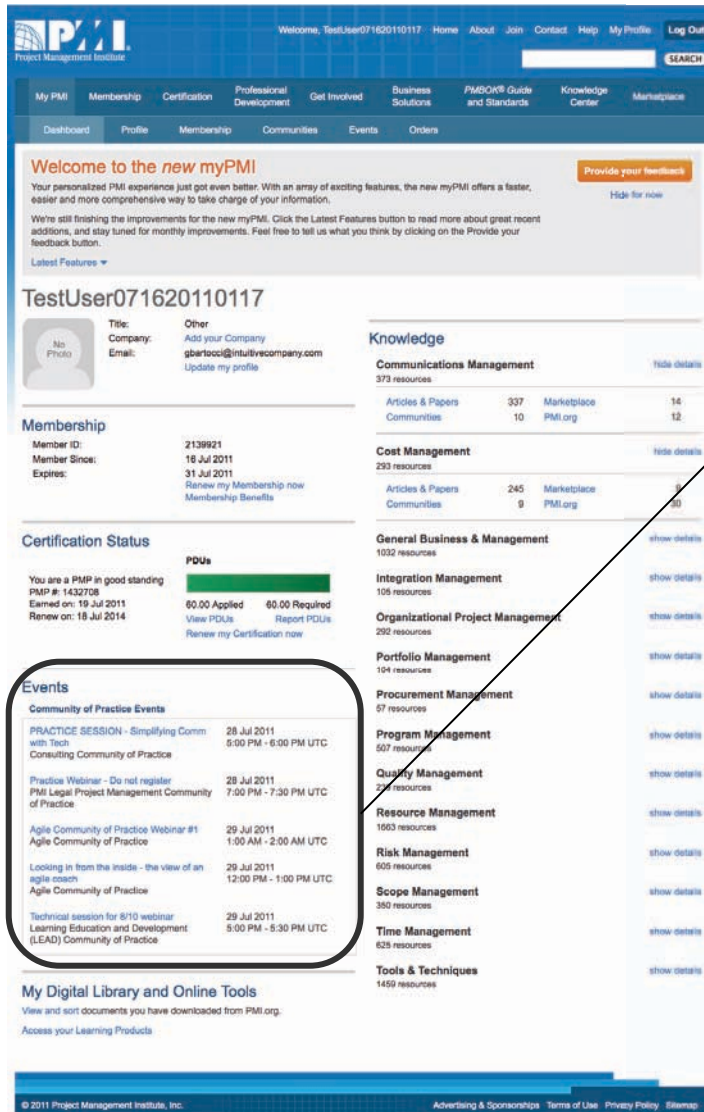
- ▲ Provide more relevant and personalized experiences that currently offered (e.g. relevant events)
- ▲ Provide a more integrated experience by:
  - ▲ Making the participants' involvement with PMI through communities more prominent throughout the experience
  - ▲ Supporting a social media-like, networking experience for members to interact and collaborate



# Future Recommendations >> Personalized & Customized Info

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Providing more relevant and personalized experiences that currently offered (e.g. relevant events)



## Events Widget

Users wanted to be able to view more personalized and relevant events in their events widget, e.g. Chapter, Volunteering, & PMI Events. They also wanted to view events for which they had already registered.

### Recommendations:

- Provide a longer list of events (including a scrollbar in the widget) that users can sort and filter based upon type of event, location, date, and titles
- Include all potential events of interest to each user – basing relevance on their CoPs, Chapters, and other activities associated with PMI

## Customizable Dashboard

Being "MY PMI," users want to be able re-organize the widgets on the page to suit their needs.

### Recommendations:

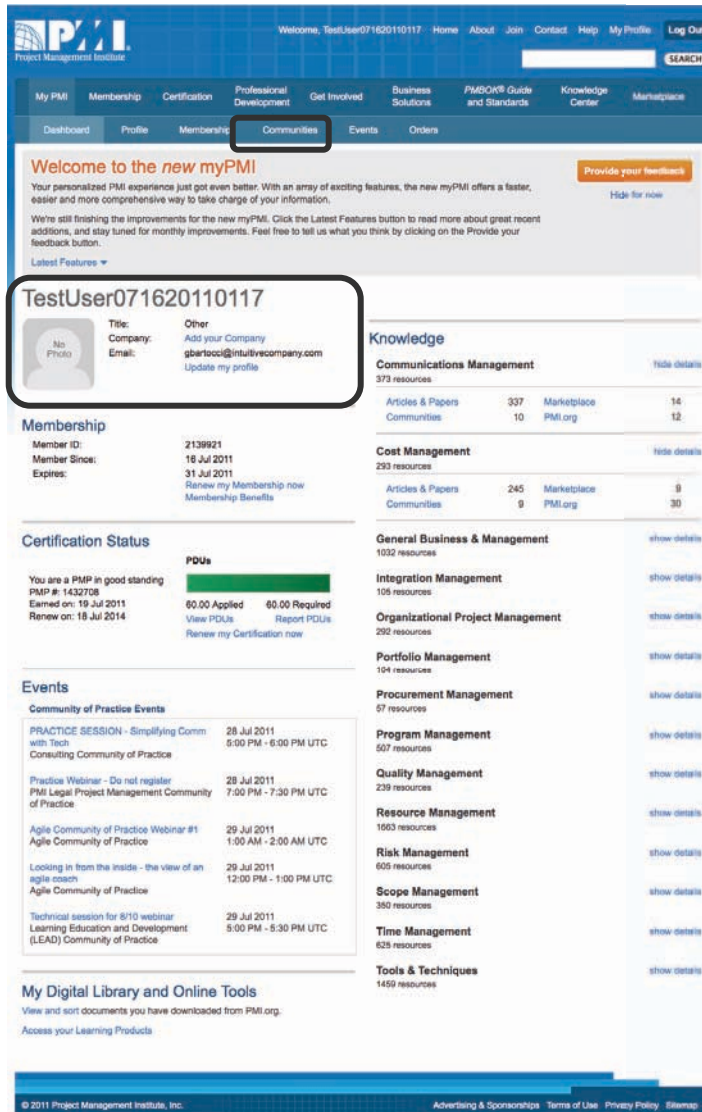
- Allow users to add/edit/delete certain widgets from the page (e.g. Google Homepage)
- Add new widgets as new functionality becomes available to support users needs (e.g. a glance at CoP discussion boards)



# Future Recommendations >> Integrated Experience - Community

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Make the participants' involvement with PMI more prominent throughout the experience (CoPs, Chapters, etc)



## Communities

Many of the users tested are very active within PMI CoPs, Chapters, Volunteering, and Committees. In fact, this is what drives them to the PMI site with relative frequency.

"80% of my clicks from PMI are related to my communities." - Participant

### Recommendations:

- Provide quick access to the user's communities, chapters, etc on the dashboard to draw them to this page (e.g. even a link via the membership area would draw them to this area to access those sites)

## Profile Widget

Participants felt that the information in the profile widget is not valuable to them on this page unless it represents some sort of public profile that is viewed across their different communities within PMI.

### Recommendations:

- Make the information in the profile widget the "public" information that others in communities see
- Make the profile information area serve as the basis for all PMI profiles needed



# Future Recommendations >> Integrated Experience - Networking

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Support a social media-like, networking experience for members to interact and collaborate

The screenshot shows the MyPMI user interface. At the top, there's a navigation bar with links like Home, About, Join, Contact, Help, My Profile, and Log Out. Below that is a search bar. The main content area is divided into several sections: a welcome message, a profile section with fields for Title, Company, and Email, a membership section showing ID and expiration, a certification status section with a progress bar for PDUs, and an events section listing upcoming practice sessions and webinars. On the right side, there's a 'Knowledge' section with a list of resource categories and their counts, such as Communications Management (373 resources), Cost Management (293 resources), and General Business & Management (1032 resources).

## User Connections

*Many of the users tested are very active within PMI CoPs, Chapters, Volunteering, and Committees. They use these groups to network with others that have similar interests.*

### Recommendations:

- Include a networking type of tool so a user can create an even smaller subset of colleagues with similar experiences and goals

## Sharing & Collaboration

*The opportunity for sharing and collaboration across PMI members via this site is huge. As mentioned, many of the reasons users access the site with relative frequency it to network, share, and interact with each other.*

### Recommendations:

- Allow users to share their information and what they are working on with each other to support collaboration (e.g. status update)
- Provide document repositories and other ways for users to share information

