Usability Guide: *Version A*

Materials:
[Google Deck Version A](#)

[0:00-3:00] Introduction

Hello, I'm [name of facilitator]. I'll be walking you through our usability test today. We also have my team member here, [name of note-taker] who will be observing this session and taking notes. Before we begin, I have some information for you and I'm going to read it to you to make sure we're on the same page.

You are here today to test out a web-based product called Hiya Connect, which helps businesses to better reach their customers through secure and branded caller IDs. When customers receive a branded call, they will be able to see the business's name, location, logo, etc. We are interested in assessing whether the product's functions work as intended. You will be asked to complete a few tasks followed by some questions, which should take no longer than 60 minutes in total. As you go through the tasks, I'm going to ask you to try to think out loud as much as possible: to say what you're looking at, what you're trying to do, and what you're thinking.

I want to make clear right away that we're testing the console and not you. You can't do anything wrong here and you don't have to worry about making mistakes. Also, I would like to note that we are not a part of the Hiya product development team so please don't worry that what you share will hurt our feelings in any way. We're doing this to improve the product, so we need to hear your honest thoughts.

If you have any questions as we go along, feel free to ask them. I may not be able to answer them right away but if you still have any questions when we're done, I'll try to answer them to the best of my abilities. And if you need to take a break at any point, just let me know.

With your permission, we're going to video-record what happens on the screen and our conversation. The recording will only be used to help us figure out how to improve our product, and it won't be seen by anyone except the people working on this project. If there is any part of the recording that you do not want to be shared with the team, please let me know at any time.

Do you have any questions before we begin?
Great, we will also begin recording this session now. *[START RECORDING]*

[3:01-4:00] Warm-up Questions

- How did you hear about the study?
- Can you tell me a bit about what you do, such as a job or schooling?
- Can I confirm that your email address is _____?

Now we will get started with the individual tasks - please go ahead and look for an email that we just sent you. In the email, there will be a link to a Google Slides deck which provides instructions for each task. As you progress through these tasks, please be mindful not to skip ahead to the next slides until you feel that you've completed the current task.

[4:01-10:00] Task 1: Onboard with email and login

[Note-taker sends email invitation link]

Now let's introduce your first task. You can find the instructions on Slide 3 of the deck.

I want you to imagine that you are a part of a team that has purchased the Hiya Connect console to help with branding your company's phone calls to customers. Your teammate has recently added you as a user, and you should have received an email from Hiya with how to set up your account. Please open this email from your inbox and follow the instructions to the best of your ability. Your task is to complete the process of setting up your account. While you are doing this, we ask that you describe to me what you're seeing and thinking.

[Once participant presses link]

Now that you have pressed on the link, we ask that you start sharing your screen.

[Participant starts screen-sharing]

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[10:01-16:00] Task 2: Upload a single phone number with brand attributes

For our next task, please go to the next slide.

Here, I'd like for you to get started by adding a phone number and its related attributes to the Hiya Connect console. Refer to the slidedeck for all the information you will need for this task. Please proceed with the task and let me know when you are done.

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[16:01-22:00] Task 3: Bulk upload phone numbers

For our next task, please go to the next slide.

Here, I want you to imagine that your manager has just sent you a list of several phone numbers to add to the Hiya console. Again, all the information you will need for this task is on this slide. Please let me know when you have finished the task.

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)

☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

[22:01-28:00] Task 4: Manage (edit/update) attributes for a group of existing numbers

For the next task, please go to next slide.

Now that we have phone numbers and their attributes added into the system, let's make some updates to these numbers. Please identify all phone numbers that have the call reason "Calling about your food delivery" and change these call reasons to "Calling about a promotional offer". Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
☐ Very difficult (1)
☐ Difficult (2)
☐ Neither difficult nor easy (3)
☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

[28:01-32:00] Task 5: Manage (edit/update) attributes for a single number

For this task, please go on the next slide.

Next, I'd like for you to identify a single phone number and change the brand attributes. Please identify the number '+1 317 555 9884' and change the call reason to "Food delivery update". Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
☐ Very difficult (1)
☐ Difficult (2)

☐ Neither difficult nor easy (3)
☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

[32:01-38:00] Task 6: Create tags to organize the bulk upload of phone numbers *OPTIONAL if time allows

For your next task, go to the next slide.

Here, I'd like for you to imagine that the phone numbers for Seattle, Washington are being put on pause while that call center is undergoing maintenance. Please find a way to label all of the numbers from Seattle, WA as 'not in use'. Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
☐ Very difficult (1)
☐ Difficult (2)
☐ Neither difficult nor easy (3)
☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

Great, you have now completed all the tasks!

[38:01-50:00] Post-Study Questionnaire

Before we conclude today's session, I would like to ask you a few last questions.

1. What was your overall experience with the Hiya Connect Console?
2. Was there a time during this study when you felt frustrated or confused? If so, when?
3. How comfortable did you feel navigating through this process?
4. What parts felt the easiest for you?
5. Anything else you can think of that would improve your experience when using the Hiya Connect platform?

Next, we ask that you fill out a brief questionnaire about your perceptions of the Hiya console. You can find the link to this questionnaire on the next slide. Remember, we are here to test the console and not you, so please provide feel free share your honest opinions. While you are completing the questionnaire, we ask that you turn off your camera and microphone and we will also turn off ours. Once you are done with the questionnaire, please turn your camera and microphone back on.

[50:01-55:00] Wrap Up

That concludes our session. Thank you for all your time and for contributing to the improvement of the Hiya console.
Are there any parts of what we covered today that you'd like to circle back to or anything you didn't get a chance to mention? *[Do NOT skip, sometimes this is the most productive part of the research.]*

As a thank you for your time, you will receive an $85 VISA gift card sent to the email we have for you on file. Can you please verify the email address that the gift card should be sent to?

[Record email response]
You should receive the gift card within the following _____ number of days.

Great, thank you!

[END RECORDING]

Debriefing Notes:

If possible, have moderator and note-taker debrief on key insights, findings, areas of improvement, etc.

Usability Guide: *Version B*

Materials:
Google Deck Version B

[0:00-3:00] Introduction

Hello, I'm [name of facilitator]. I'll be walking you through our usability test today. We also have my team member here, [name of note-taker] who will be observing this session and taking notes. Before we begin, I have some information for you and I'm going to read it to you to make sure we're on the same page.

You are here today to test out a web-based product called Hiya Connect, which helps businesses to better reach their customers through secure and branded caller IDs. When customers receive a branded call, they will be able to see the business's name, location, logo, etc. We are interested in assessing whether the product's functions work as intended. You will be asked to complete a few tasks followed by some questions, which should take no longer than 60 minutes in total. As you go through the tasks, I'm going to ask you to try to think out loud as much as possible: to say what you're looking at, what you're trying to do, and what you're thinking.

I want to make clear right away that we're testing the console and not you. You can't do anything wrong here and you don't have to worry about making mistakes. Also, I would like to note that we are not a part of the Hiya product development team so please don't worry that what you share will hurt our feelings in any way. We're doing this to improve the product, so we need to hear your honest thoughts.

If you have any questions as we go along, feel free to ask them. I may not be able to answer them right away but if you still have any questions when we're done, I'll try to answer them to the best of my abilities. And if you need to take a break at any point, just let me know.

With your permission, we're going to video-record what happens on the screen and our conversation. The recording will only be used to help us figure out how to improve our product, and it won't be seen by anyone except the people working on this project. If there is any part of the recording that you do not want to be shared with the team, please let me know at any time.

Do you have any questions before we begin?
Great, we will also begin recording this session now.
[START RECORDING]

[3:01-4:00] Warm-up Questions

- How did you hear about the study?
- Can you tell me a bit about what you do, such as a job or schooling?
- Can I confirm that your email address is _____?

Now we will get started with the individual tasks - please go ahead and look for an email that we just sent you. In the email, there will be a link to a Google Slides deck which provides instructions for each task. As you progress through these tasks, please be mindful not to skip ahead to the next slides until you feel that you've completed the current task.

[4:01-10:00] Task 1: Onboard with email and login

[Note-taker sends email invitation link]

Now let's introduce your first task. You can find the instructions on Slide 3 of the deck.

I want you to imagine that you are a part of a team that has purchased the Hiya Connect console to help with branding your company's phone calls to customers. Your teammate has recently added you as a user, and you should have received an email from Hiya with how to set up your account. Please open this email from your inbox and follow the instructions to the best of your ability. Your task is to complete the process of setting up your account. While you are doing this, we ask that you describe to me what you're seeing and thinking.

[Once participant presses link]

Now that you have pressed on the link, we ask that you start sharing your screen.

[Participant starts screen-sharing]

Great, we will also begin recording this session now. *[START RECORDING]*

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[10:01-16:00] Task 2: Upload a single phone number with brand attributes

For our next task, please go to the next slide.

Here, I'd like for you to get started by adding a phone number and its related attributes to the Hiya Connect console. Refer to the slidedeck for all the information you will need for this task. Please proceed with the task and let me know when you are done.

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.

- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[16:01-22:00] Task 3: Bulk upload phone numbers

For our next task, please go to the next slide.

Here, I want you to imagine that your manager has just sent you a list of several phone numbers to add to the Hiya console. Again, all the information you will need for this task is on this slide. Please let me know when you have finished the task.

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.

- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[22:01-28:00] Task 4: Manage (edit/update) attributes for a single number

For this task, please go on the next slide.

I'd like for you to identify a single phone number and change the brand attributes. Please identify the number '+1 317 555 9884' and change the call reason to "Food delivery update". Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[28:01-32:00] Task 5: Manage (edit/update) attributes for a group of existing numbers

For the next task, please go to the next slide.

Now that we have phone numbers and their attributes added into the system, let's make some updates to these numbers. Please identify all phone numbers that have the call reason "Calling about your food delivery" and change these call reasons to "Calling about a promotional offer". Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[32:01-38:00] Task 6: Create tags to organize the bulk upload of phone numbers *OPTIONAL if time allows

For your next task, go to the next slide.

Here, I'd like for you to imagine that the phone numbers for Seattle, Washington are being put on pause while that call center is undergoing maintenance. Please find a way to label all of the numbers from Seattle, WA as 'not in use'. Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

Great, you have now completed all the tasks!

[38:01-50:00] Post-Study Questionnaire

Before we conclude today's session, I would like to ask you a few last questions.

6. What was your overall experience with the Hiya Connect Console?
7. Was there a time during this study when you felt frustrated or confused? If so, when?
8. How comfortable did you feel navigating through this process?
9. What parts felt the easiest for you?
10. Anything else you can think of that would improve your experience when using the Hiya Connect platform?

Next, we ask that you fill out a brief questionnaire about your perceptions of the Hiya console. You can find the link to this questionnaire on the next slide. Remember, we are here to test the console and not you, so please provide feel free share your honest opinions. While you are completing the questionnaire, we ask that you turn off your camera and microphone and we

will also turn off ours. Once you are done with the questionnaire, please turn your camera and microphone back on.

[50:01-55:00] Wrap Up

That concludes our session. Thank you for all your time and for contributing to the improvement of the Hiya console.
Are there any parts of what we covered today that you'd like to circle back to or anything you didn't get a chance to mention? *[Do NOT skip, sometimes this is the most productive part of the research.]*

As a thank you for your time, you will receive an $85 VISA gift card sent to the email we have for you on file. Can you please verify the email address that the gift card should be sent to? You should receive the giftcard within the following _____ number of days.

Great, thank you!

==[End recording]==

Usability Guide: *Version C*

Materials:
[Google Deck Version C](#)

[0:00-3:00] Introduction

Hello, I'm [name of facilitator]. I'll be walking you through our usability test today. We also have my team member here, [name of note-taker] who will be observing this session and taking notes. Before we begin, I have some information for you and I'm going to read it to you to make sure we're on the same page.

You are here today to test out a web-based product called Hiya Connect, which helps businesses to better reach their customers through secure and branded caller IDs. When customers receive a branded call, they will be able to see the business's name, location, logo, etc. We are interested in assessing whether the product's functions work as intended. You will be asked to complete a few tasks followed by some questions, which should take no longer than 60 minutes in total. As you go through the tasks, I'm going to ask you to try to think out

loud as much as possible: to say what you're looking at, what you're trying to do, and what you're thinking.

I want to make clear right away that we're testing the console and not you. You can't do anything wrong here and you don't have to worry about making mistakes. Also, I would like to note that we are not a part of the Hiya product development team so please don't worry that what you share will hurt our feelings in any way. We're doing this to improve the product, so we need to hear your honest thoughts.

If you have any questions as we go along, feel free to ask them. I may not be able to answer them right away but if you still have any questions when we're done, I'll try to answer them to the best of my abilities. And if you need to take a break at any point, just let me know.

With your permission, we're going to video-record what happens on the screen and our conversation. The recording will only be used to help us figure out how to improve our product, and it won't be seen by anyone except the people working on this project. If there is any part of the recording that you do not want to be shared with the team, please let me know at any time.

Do you have any questions before we begin?
Great, we will also begin recording this session now. *[START RECORDING]*

[3:01-4:00] Warm-up Questions

- How did you hear about the study?
- Can you tell me a bit about what you do, such as a job or schooling?
- Can I confirm that your email address is _____?

Now we will get started with the individual tasks - please go ahead and look for an email that we just sent you. In the email, there will be a link to a Google Slides deck which provides instructions for each task. As you progress through these tasks, please be mindful not to skip ahead to the next slides until you feel that you've completed the current task.

[4:01-10:00] Task 1: Onboard with email and login

[Note-taker sends email invitation link]

Now let's introduce your first task. You can find the instructions on Slide 3 of the deck.

I want you to imagine that you are a part of a team that has purchased the Hiya Connect console to help with branding your company's phone calls to customers. Your teammate has recently added you as a user, and you should have received an email from Hiya with how to set up your account. Please open this email from your inbox and follow the instructions to the best of your ability. Your task is to complete the process of setting up your account. While you are doing this, we ask that you describe to me what you're seeing and thinking.

[Once participant presses link]

Now that you have pressed on the link, we ask that you start sharing your screen.

[Participant starts screen-sharing]

Great, we will also begin recording this session now. <mark>*[START RECORDING]*</mark>

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[10:01-16:00] Task 2: Bulk upload phone numbers

For our next task, please go to the next slide.

Here, I want you to imagine that your manager has just sent you a list of several phone numbers to add to the Hiya console. Again, all the information you will need for this task is on this slide. Please let me know when you have finished the task.

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.

☐ Very difficult (1)
☐ Difficult (2)
☐ Neither difficult nor easy (3)
☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

[16:01-22:00] Task 3: Upload a single phone number with brand attributes

For our next task, please go the next slide.

Here, I'd like for you to get started by adding a phone number and its related attributes to the Hiya Connect console. Refer to the slidedeck for all the information you will need for this task. Please proceed with the task and let me know when you are done. attributes

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
☐ Very difficult (1)
☐ Difficult (2)
☐ Neither difficult nor easy (3)
☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

[22:01-28:00] Task 4: Manage (edit/update) attributes for a group of existing numbers

For the next task, please go to next slide.

Now that we have phone numbers and their attributes added into the system, let's make some updates to these numbers. Please identify all phone numbers that have the call reason "Calling about your food delivery" and change these call reasons to "Calling about a promotional offer". Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.

☐ Very difficult (1)
☐ Difficult (2)
☐ Neither difficult nor easy (3)
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Why did you give it that rating?

[28:01-32:00] Task 5: Manage (edit/update) attributes for a single number

For this task, please go on the next slide.

Next, I'd like for you to identify a single phone number and change the brand attributes. Please identify the number '+1 317 555 9884' and change the call reason to "Food delivery update". Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.

☐ Very difficult (1)
☐ Difficult (2)
☐ Neither difficult nor easy (3)
☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

[32:01-38:00] Task 6: Create tags to organize the bulk upload of phone numbers
*OPTIONAL if time allows

For your next task, go to the next slide.

Here, I'd like for you to imagine that the phone numbers for Seattle, Washington are being put on pause while that call center is undergoing maintenance. Please find a way to label all of the numbers from Seattle, WA as 'not in use'. Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

Great, you have now completed all the tasks!

[38:01-50:00] Post-Study Questionnaire
Before we conclude today's session, I would like to ask you a few last questions.

11. What was your overall experience with the Hiya Connect Console?
12. Was there a time during this study when you felt frustrated or confused? If so, when?
13. How comfortable did you feel navigating through this process?
14. What parts felt the easiest for you?
15. Anything else you can think of that would improve your experience when using the Hiya Connect platform?

Next, we ask that you fill out a brief questionnaire about your perceptions of the Hiya console. You can find the link to this questionnaire on the next slide. Remember, we are here to test the console and not you, so please provide feel free share your honest opinions. While you are completing the questionnaire, we ask that you turn off your camera and microphone and we will also turn off ours. Once you are done with the questionnaire, please turn your camera and microphone back on.

[50:01-55:00] Wrap Up

That concludes our session. Thank you for all your time and for contributing to the improvement of the Hiya console.
Are there any parts of what we covered today that you'd like to circle back to or anything you didn't get a chance to mention? *[Do NOT skip, sometimes this is the most productive part of the research.]*

As a thank you for your time, you will receive an $85 VISA gift card sent to the email we have for you on file. Can you please verify the email address that the gift card should be sent to? You should receive the giftcard within the following ____ number of days.

Great, thank you!

<mark>[End recording]</mark>

Usability Guide: *Version D*

Materials:
[Google Deck Version D](#)

[0:00-3:00] Introduction

Hello, I'm [name of facilitator]. I'll be walking you through our usability test today. We also have my team member here, [name of note-taker] who will be observing this session and taking notes. Before we begin, I have some information for you and I'm going to read it to you to make sure we're on the same page.

You are here today to test out a web-based product called Hiya Connect, which helps businesses to better reach their customers through secure and branded caller IDs. When customers receive a branded call, they will be able to see the business's name, location, logo, etc. We are interested in assessing whether the product's functions work as intended. You will be asked to complete a few tasks followed by some questions, which should take no longer than 60 minutes in total. As you go through the tasks, I'm going to ask you to try to think out loud as much as possible: to say what you're looking at, what you're trying to do, and what you're thinking.

I want to make clear right away that we're testing the console and not you. You can't do anything wrong here and you don't have to worry about making mistakes. Also, I would like to note that we are not a part of the Hiya product development team so please don't worry that what you share will hurt our feelings in any way. We're doing this to improve the product, so we need to hear your honest thoughts.

If you have any questions as we go along, feel free to ask them. I may not be able to answer them right away but if you still have any questions when we're done, I'll try to answer them to the best of my abilities. And if you need to take a break at any point, just let me know.

With your permission, we're going to video-record what happens on the screen and our conversation. The recording will only be used to help us figure out how to improve our product, and it won't be seen by anyone except the people working on this project. If there is any part of the recording that you do not want to be shared with the team, please let me know at any time.

Do you have any questions before we begin?
Great, we will also begin recording this session now. *[START RECORDING]*

[3:01-4:00] Warm-up Questions

- How did you hear about the study?
- Can you tell me a bit about what you do, such as a job or schooling?
- Can I confirm that your email address is _____?

Now we will get started with the individual tasks - please go ahead and look for an email that we just sent you. In the email, there will be a link to a Google Slides deck which provides instructions for each task. As you progress through these tasks, please be mindful not to skip ahead to the next slides until you feel that you've completed the current task.

[4:01-10:00] Task 1: Onboard with email and login

[Note-taker sends email invitation link]

Now let's introduce your first task. You can find the instructions on Slide 3 of the deck.

I want you to imagine that you are a part of a team that has purchased the Hiya Connect console to help with branding your company's phone calls to customers. Your teammate has recently added you as a user, and you should have received an email from Hiya with how to set up your account. Please open this email from your inbox and follow the instructions to the best of your ability. Your task is to complete the process of setting up your account. While you are doing this, we ask that you describe to me what you're seeing and thinking.

[Once participant presses link]

Now that you have pressed on the link, we ask that you start sharing your screen.

[Participant starts screen-sharing]

Great, we will also begin recording this session now. *[START RECORDING]*

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[10:01-16:00] Task 2: Bulk upload phone numbers

For our next task, please go the next slide.

Here, I want you to imagine that your manager has just sent you a list of several phone numbers to add to the Hiya console. Again, all the information you will need for this task is on this slide. Please let me know when you have finished the task.

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[16:01-22:00] Task 3: Upload a single phone number with brand attributes

For our next task, please go the next slide.

Here, I'd like for you to get started by adding a phone number and its related attributes to the Hiya Connect console. Refer to the slidedeck for all the information you will need for this task. Please proceed with the task and let me know when you are done. attributes

[After Participant has indicated that they are done with the task]

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
☐ Very difficult (1)
☐ Difficult (2)
☐ Neither difficult nor easy (3)
☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

[22:01-28:00] Task 4: Manage (edit/update) attributes for a single number

For this task, please go on the next slide.

Next, I'd like for you to identify a single phone number and change the brand attributes. Please identify the number '+1 317 555 9884' and change the call reason to "Food delivery update". Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
☐ Very difficult (1)
☐ Difficult (2)
☐ Neither difficult nor easy (3)
☐ Easy (4)
☐ Very Easy (5)

Why did you give it that rating?

[28:01-32:00] Task 5: Manage (edit/update) attributes for a group of existing numbers

For the next task, please go to next slide.

Now that we have phone numbers and their attributes added into the system, let's make some updates to these numbers. Please identify all phone numbers that have the call reason "Calling about your food delivery" and change these call reasons to "Calling about a promotional offer". Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

[32:01-38:00] Task 6: Create tags to organize the bulk upload of phone numbers *OPTIONAL if time allows

For your next task, go to the next slide.

Here, I'd like for you to imagine that the phone numbers for Seattle, Washington are being put on pause while that call center is undergoing maintenance. Please find a way to label all of the numbers from Seattle, WA as 'not in use'. Please let me know when you have finished the task.

Now that you've completed the task, I would like to ask….

How would you rate the level of ease in completing the task you just performed on a scale of 1 to 5? With 1 being that the task was very difficult to 5 being it was very easy.
- ☐ Very difficult (1)
- ☐ Difficult (2)
- ☐ Neither difficult nor easy (3)
- ☐ Easy (4)
- ☐ Very Easy (5)

Why did you give it that rating?

Great, you have now completed all the tasks!

[38:01-50:00] Post-Study Questionnaire

Before we conclude today's session, I would like to ask you a few last questions.

16. What was your overall experience with the Hiya Connect Console?
17. Was there a time during this study when you felt frustrated or confused? If so, when?
18. How comfortable did you feel navigating through this process?
19. What parts felt the easiest for you?
20. Anything else you can think of that would improve your experience when using the Hiya Connect platform?

Next, we ask that you fill out a brief questionnaire about your perceptions of the Hiya console. You can find the link to this questionnaire on the next slide. Remember, we are here to test the console and not you, so feel free to share your honest opinions. While you are completing the questionnaire, we ask that you turn off your camera and microphone and we will also turn off ours. Once you are done with the questionnaire, please turn your camera and microphone back on.

[50:01-55:00] Wrap Up

That concludes our session. Thank you for all your time and for contributing to the improvement of the Hiya console.
Are there any parts of what we covered today that you'd like to circle back to or anything you didn't get a chance to mention? *[Do NOT skip, sometimes this is the most productive part of the research.]*

As a thank you for your time, you will receive an $85 VISA gift card sent to the email we have for you on file. Can you please verify the email address that the gift card should be sent to? You should receive the gift card within the following _____ number of days.

Great, thank you! [End recording]