

Preparing for research:

1. Identify research goals
2. Create an ideal (but flexible) plan to address those goals

Session information:

User	Time	Moderator	Tech
Session #1	1:30 - 2:15 pm		
Session #2	2:15 - 3:00 pm		

Goals

- Gain a deeper understanding of the Advancement team's roles including the primary tasks they aim to complete daily.
 - Gain an understanding around institutional frameworks and processes that impact user workflow or tool usage.
 - Better understand how Salesforce fits into the Advancement team's workflow.
 - Learn more about common usage patterns and pain points, including if there are any workarounds users implement to bypass pain points.
 - Better understand the degree to which the interface language matches user expectations.
 - Better understand the hierarchy of data in the tool and how data is used outside of the tool.
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Moderator

Intro Script:

Thank you so much for spending some time with us today. The main focus of our interview/observation session is to understand the different activities you complete during work on a day to day basis and how you use Salesforce to complete these activities. The goal is to understand how Salesforce fits into your workflow so we can recommend improvements. The interview/observation session will take 45 minutes.

We consider you the expert at your work so there are no wrong answers to any of our questions. While you answer questions or guide us through tasks, please focus on the details of how you actually do your work. It may help to think about the last time you performed the task and explain it to us as if we are going to need to perform the task just as you did. Please feel free to be honest and critical even if the way your work actually gets done is not the way you would ideally like for it to be done. Everything you tell us is strictly confidential.

Please review and sign the consent form before we proceed.

Any questions before we begin?

Background Questions

Before we start, I'd like to ask a few background questions.

How long have you been working at Mia? What about in this role?

Could you please describe what your role entails? What does a typical day at work look like?

Can you describe what a really great day at work looks like for you?

How about a not so great day?

Do you typically work together or solo?

How does your solo work differ from group work?

How much of your work do you do on a computer on a given day?

How does Salesforce fit in with what you do in your role?
(Follow up if not answered already) How often do you use Salesforce?

What other tools do you use to complete work in a given day?

Can you tell me which tasks you prioritize as the most important? Why?

Script:

Great, thanks for answering those questions. We will mostly be observing and listening to how you do things at this point , so if you can please try to think-aloud as you're working. This will be helpful for us to understand your work process. However, we understand that you are currently working and wish not to get in the way of you doing your job.

Activities we'd like to see:**Gift Entry****Other prioritized activities described by participants****Follow Up Questions**

How long would you say it took you to learn how to use the current system?

Are there any final thoughts or feelings that you'd like to share with us?

Thank you so much for your time today. Would you be open to answering any potential follow up questions via email or through a survey.