



# What Does Usability Mean at Edgar?

At Edgar, Usability refers to a functional area of the product team. Usability is responsible for maintaining a seamless, accurate, efficient, and reliable customer experience across our marketing sites, apps, and user knowledge bases by maintaining, editing, and providing feedback on copy, features, and function and performing user research and testing as we iterate and improve our products. It's our job to know our products and our customers inside and out so we can support the rest of the team in their roles. By contributing to an integrated customer experience, we enable the most efficient use of our products and their features for our users and fulfill our company purpose: we help small businesses succeed.

## Usability Key Areas of Ownership:

- **Quality Assurance Testing:** run each product story through a practical test prior to release to our customers.
- **User Research and Testing:** design and implement user research and testing studies and interpret the data gathered into usable formats to inform marketing, design, and development plans throughout the company.
- **Customer Troubleshooting:** complex, widespread, or troubleshooting issues that go beyond routine t/s that inbox team members perform. Investigate user reported issues, gather information about them, and report bugs to the development team through GitHub issues.
- **Help Docs:** update copy, screenshots, and videos as necessary to maintain an accurate, usable, and up to date user knowledge base.
- **Information Dissemination:**
- Notify the Marketing team of any app changes that may affect marketing site copy or MailChimp copy

- Notify the customer experience team of any changes that may be needed to in-app or email messaging in Intercom
- Keep CX and Marketing updated on status of bugs, features, and deploys

## Quality Assurance

Usability performs quality assurance testing on new features and bug fixes from the product team as well as design and copy changes to the marketing sites before they are deployed to the production version (the one customer's use) to make sure they work as expected and maintain the high standards we strive for in creating a professional and useful web app. QA is undertaken with a perspective to the company as a whole and as an advocate for the customer experience.

### QA Key Values

- Accuracy
- Thoroughness
- Tone

Key questions to ask when performing QA functions, whether you are providing information to dev, other departments, or customers:

- Am I providing the most accurate, detailed information possible to pinpoint the issue while maintaining clarity?
- Have I been thorough in my investigation, identifying any adjoining areas of the app, company, or copy that may have been affected by the issue, feature, or fix at hand? Look beyond the narrow scope of the story to the company as a whole.
- Am I providing my feedback or solution in a clear, informative, and non-judgmental tone? The nature of QA work is to provide constructive feedback to the author of the feature, copy, or product you are reviewing. Detail not only the issue or error you have discovered but also potential solutions, preferred expected behavior, or next steps. Do not provide **negative** feedback; provide **constructive, user-centered** options. For feedback guidance, review the [MeetEdgar Feedback Guidelines](#).

# User Research and Testing

One purpose drives the direction of user research and testing within Usability: gain a thorough understanding of how our users interact with Edgar, why they succeed, and why they stumble. The insights gained from usability testing and research are disseminated among Edgar's marketing, product, and customer experience teams to support the company's goal of helping small business succeed. The team sees itself as part of the human effort to make life easier.

When conducting user research, the team chooses to dive into the lives of users chosen for study, noting observations and recording interviews within field notes. These qualitative methods allow for a big-picture-first point of view, which the team then breaks down and analyzes with quantitative measures. The team facilitates user testing from the opposite end: test a specific hypothesis around a specific feature for a specific type of user, then mine those small details for big picture insights. Planning and execution of user research and testing takes care to respect financial priorities and time constraints.

## User Research & Testing Key Values

- Conscious
- Constructive
- Clean

## Value-aligned questions to ask in & out of the field:

- Have I arrived from a place of understanding and compassion for the user? Have I been conscious and appreciative of their time? Is this test aligned with the priorities of the company?
- Why is this research significant? Does my report provide constructive, user-centered feedback? Have I made a template or used a method I can repeat again for another test? If so, how can I improve that template or method for next time?
- Do I interact with users in a polite, concise manner using plain English? Have I followed the guidelines of reproducible research? Can I clearly communicate the nuances of this data when suggesting action items for Edgar's user-facing departments?

## Usability Team Member Responsibilities and Expectations

- Acquire and maintain a thorough working knowledge of our app, including quirks and edge cases.
- Regularly review the help docs both to improve personal knowledge of the app and to identify docs that require updates.
- Regularly perform regression tests outside of story testing to locate any bugs that crop up unexpectedly and to improve app knowledge continuously.
- Regularly participate in customer inbox duty with a focus on troubleshooting tickets to maintain a working knowledge of user issues, feature requests, and pain points.
- Proactively provide updates and feedback to CX team and company at large to identify and prevent possible overlaps, inconsistencies, or breakdowns in our messaging and customer experience. Don't wait for something to be assigned to you. If you see a potential issue, speak up.
- Always look for opportunities to improve the usability of any and all aspects of the MeetEdgar environment, both for customers and for employees.