

# Flex Baseline Pilot Results

## Executive Summary

### Objective

Establish a quantitative baseline for **core tasks** involved in a simple event set up using Flex Standard 2.0 to track and measure over time.

### High-Level Findings

Overall, the 27 Early Adopter participants could accomplish the 10 tasks to set up a simple event in an average time of 50 minutes. Nearly all of these tasks scored within the **targeted performance metrics** set prior to the study. Users had the most difficulty with configuring global changes (**Task 5**), changes to web/registration pages (**Task 6, Task 7**), and launching the event tasks (**Task 10**). Standard 2.0, Flex, scored a SUS of 68.8 with an NPS of 22, compared to a SUS of 49.3 and NPS of -20 for the existing Standard 1.0 version. Customers also provided encouraging feedback.





"I would definitely use the Site Designer, it is WAY easier than what you guys have before." "Keep improving it. I am sure it will get there!"

Baseline findings are consistent with previous studies indicating an improvement from the current version of the product, however; SUS and NPS scores remain below Cvent's targets of 80 SUS and 28 NPS. Interestingly, a few participants mentioned Wix and Squarespace, directly comparing their Cvent experiences with other products.

"If you haven't already, someone should go and build a website using Wix or Squarespace to see how this differs from their drag and drop models. I use Squarespace and find it much simpler and less frustrating (really in regard to the formatting)." "For anyone who has not used a website builder like Weebly or Wix, there will be a steep learning curve. There were a couple things I couldn't figure out how to do."

### Issues & Evidence:

Users continue to struggle in the following areas: **(Videos are confidential information, please do not share videos)**

1. **24 of 27 users had trouble adding content to a page** - Video  

2. **18 of 27 users did not publish their site before previewing or testing** - Video  

3. **13 of 27 users got lost navigating between pages as well as within the right-hand panel** - Video  

4. **14 of 27 users had trouble understanding how to apply global versus local changes** - Video  


### Next Steps

- Regroup with cross-discipline team to determine low effort solutions to minimize users' confusion in Flex's current state (CS, training & documentation, PM). Done Dec. 12 - Links: <https://cvent.box.com/s/do1blebquo7bl8gycorntq3hce6oo6a9> & [Flex Onboarding Ideas](#)
- Regroup with Design, PM, Dev to discuss results and determine if any impact on Site Editor Solutions/Development proposal
- Begin regular and ongoing implementation/test cycles on Site Editor Solutions to establish SUS
- Continue baseline efforts:
  - Run study with non-Early Adopter participants
  - Extend baseline to cover more complex task scenarios

### Methodology

Remote quantitative unmoderated testing using "Validately" tool. From a list of 292 Early Adopters and 8 referrals, users were recruited and pre-screened based on **a targeted participant criteria**. The majority of participants are: female, between 25-44 years old, work in government/associations/non-profit/educations industries (GANE), hold a Cvent Admin role, with more than 2 years experience using Cvent, have played around with Flex to try it out, have personally launched between 1-4 events in Cvent, and planned between 1-9 events. Participants were offered \$100 Amazon gift card for those who qualified and completed the unmoderated session.

# Main Findings & Evidence

Ten core tasks were created in collaboration with the PM to mirror a natural sequence of the [activities/tasks](#) users need to accomplish to set up and launch a simple event in Event Management.

Overall, the 27 Early Adopter participants could accomplish the 10 tasks to set up a simple event in an average time of 50 minutes. Nearly all of these tasks scored within the [targeted performance metrics](#) set prior to the study. Although users were able to successfully complete most tasks, they struggled with the following four areas:

1. **Users had trouble adding content to a page**
2. **Users did not publish their site before previewing or testing**
3. **Users got lost navigating between pages as well as within the right-hand panel**
4. **Users had trouble understanding how to apply global versus local changes**

## Additional Information:

- **Other Issues or Items of Note**
- **Metrics Details**
- **Task Performance Metrics**
- **Methodology**

*(Videos are confidential information, please do not share videos)*

## **1. Issue: Users are having trouble adding content to a page - Video**



, **Video**



Users initially have issues adding content to a page, particularly a blank page, but were able to recover

**Almost all users (24 of 27) users had general issues adding content at one point or another. Video**



"I can drag and drop [onto this blank page], but where do I drag and drop from? Where do I add in text? Where do I click on?"

"So probably on this page, the personal information page, I need to add something. But I don't see HOW I would add it. [...] That was not intuitive, but I think I got it."

"There was a lot of back and forth between editing the content and the styles. I would prefer that the content and style of the content be edited all in the same place. I'm very used to WYSIWYG editors where the content can be styled in the same place where it is typed."

## **Users had issues selecting and editing widgets and their properties. Video**



"I tried clicking and right clicking [to add the widget]"

"But again it is really hard to scroll and every section looks exactly the same. I mean I appreciate the customization of every possible little piece but every section looks identical."

"Again it is still not showing you where its going. The blue bar, there is nothing showing me that it can go on the side here. I don't even know if it got inserted. Look they are not even side by side. Can it go here? Can it go on the side? Do I have to make it 2 column before that can even happen?"

"How do you remove the seconds' timer? Do you right click on it? Nope."

**Users did not find the logo upload in the Quick Theme Panel or within the Navigation Bar widget.**

However, as they went through other tasks, they discovered and corrected the logo. **Video**



When attempting to add a logo, 16 users tried to either change the background image or add an image widget to the section. 26 total counts of users struggling were noted.

"It feels like there should be a way to drag the bottom of this section or edit this section [to make the background image as a logo fit]. [...] Oh, so spacing is where that is!"

"Do I need to double click this or...?"

Although users learn quickly, 20 users first clicked directly on a widget to edit the text at least once before moving over to the panel. **Video**



"I have the paste the text in on this side."

"Nope, can't type it onto the page, have to do it on the side... so your question goes there."

"It would be nice if you could just make the change [on the canvas] since that is what you click on. Instead of going from [the widget], clicking on the field then going to the righthand navigation."

"Again, if you're going to make me drag it over here, let me type it over here [on the widget]"

## **2. Issue: Users did not publish their site before previewing or testing - Video**



Note: this is the first study where participants were actually able to test and publish their site.

Publish button functionality was not widely understood; some did not know that it also saved, some did not understand that it had to be published to view in Preview or Test modes. This is a high-risk area if they don't realize that they are NOT collecting registrations.

**Eighteen users did not publish their changes in Site Designer to see them when Testing or Previewing. Five users never saved their changes, believing Flex did it automatically. Video**



Even after discovering their changes were not there, some users forgot to save and publish after making a set of edits.

"Why is that page not showing? I really don't know the answer to that. 'Publish,' I guess? That didn't seem to do anything."

"I wonder if this is the one I had done... it doesn't look like it. Yep, it does not look like the one I put together."

"I wonder if I didn't hit Publish on my Site Designer."

"Ooooh...I did not publish it."

"One question is if you hit 'Publish,' is that the same as saving? Maybe change 'Publish' to 'Save and Publish'? That might be helpful. Because I feel like I need to do both, but I probably don't."

"I don't think I saved it initially, which is why it doesn't have the correct color palette, sorry!"

"And here, by X-ing out, you don't know if it was saved."

"So I guess you do have to save? I don't know why I thought you didn't. [...] One thing I think would be helpful if it doesn't save automatically is to have one of those little 'Would you like to save your changes?' messages before you were allowed to leave the page."

"I felt like I should save before I leave that spot, cause it's not clear if I'll lose all of my work..."

**Four users assumed that when they published their site, it would be live and collect registrations,**

resulting in the second highest fail rate of the study. **Video**



"Well I actually already kind of [made my event live and able to collect registrations by publishing in Site Designer], so... 'Publish.'"

### **3. Issue: Users got lost navigating between pages as well as within the right-hand panel - Video**



Throughout the tasks involving Flex, users were unsure about where they were in the overall structure. Thirteen participants faced medium to major issues with this, resulting in over 35 instances of users documented as 'lost' within the activity.

#### **Evidence**

**When users are deep within a menu, the visibility of the navigation for Content/Theme/Pages/Widget Properties disappears, and there is no easy way to navigate back or pivot to the other options. Video**



"I didnt realize I was so deep in [the right-hand menu structure.]"

"All I wanted was one thing, and I had to go through a lot of bells and whistles."

"But again it is really hard to scroll, and every section looks exactly the same. I mean, I appreciate the customization of every possible little piece but every section looks identical."

"It would be nice to condense all the customize menus - it is a little tricky trying to figure out what is being edited on each. The formatting areas were all separated, and making changes takes longer because you are never really sure of where things are located."

"But its weird that on the right-hand side that there's nothing... from the highlight what is indicating... how to do these things."

**Users don't always recognize what property or widget they are editing. Video**



When asked to edit the countdown "That doesn't make sense [...] No idea where to go to change that"

"Okay, there are more options here than expected. [...] I'm debating whether to go to the 'widget' option or the 'counter'"

"it would be nice to condense all the customize menus - its a little tricky trying to figure out what is being edited on each"

**Users aren't always certain what page they are on/editing. Video**



"Ok so let's go to that page [I just created]... how do I get? How do I get to the actual page? So let's go to that page. No, how do I get... How to get to the actual page. Let's click save and figure out how to get to this page. No, I don't want to edit the header and footer, I just got to this page. I feel so stupid that I can't figure... that I can't... [...] Am I on the venue page? I guess I'm on the venue page... Oh so under here, I need to add... [...] Ok that's where I went wrong. We need to remember to click to add things to that page. Because it just looks empty, even though it IS the page I'm looking for, it just doesnt have content on it."

"I wasn't really sure how to get to the summary page at first. Once I was in there, I just kind of guessed where I thought the color would be, turns out I was right, but that could take a while."

"Its not letting me save. I don't know why. What am I in right now? Im still in the header and the footer, so let me go back over to the website. So f\*cking strange, OH thats why, because you're in the header and footer and once you're IN it, it doesnt make any sense. Okay, that makes sense."

## Notes/considerations

Revisit the information architecture in the right-hand panel. Separate the three main functions (adding content, editing the theme, and adding/navigation pages). Add breadcrumbs when a user drills into the menus so they can understand where they are, and make the labels (particularly the header labels) clearer.

## **4. Issue: Users have trouble understanding how to apply global versus local changes -**

### Video



While making global changes had a high success rate, it was only after many users struggled to make their changes. The task asking for these global changes took the longest and was rated the most difficult (see Task 6 in the [Task Table](#)).

Fourteen participants struggled with this, leading to 32 areas tagged as confusion or misunderstanding if the change is local or global.

### Evidence

**Users don't understand how header/footer applies across pages. Nine users had 34 instances of struggling to edit the header/footer, or not understanding how it applies across their pages. Video**



"So then I cant remove the seconds from the countdown clock like I did on the summary page. Which would mean that I would have to edit back to the Summary page so it would have to be the same, or I would have to remove the widget altogether. Unless I'm missing something, which is entirely possible."

"This is not part of the header and footer...is it?"

"I'm assuming its changing it for the entire website? Although now that I'm looking at it, it might just be changing it in the header/footer? I hope that's not the case."

"Well, I know I've added it here... is there a way to apply all?"

**Users can edit themes but don't understand where it applies. Video**



"It would be nice if there were helpful icons to hover over information as to what does 'Primary' and 'Secondary' mean? At least, so you're confident you're in the right area."

"How am I supposed to remember what my secondary color in my palette was?"

"So it doesn't look like I can easily change to the colors I had inputted."

"Guess I have to go back and grab [the code for my secondary color in my palette] ... which is super annoying. That's really annoying...extremely, super annoying."

"Again like it would be helpful to at least know where these are gonna be applied if to make it very clear where are these the accents gonna be applied. 'Text accents,' what does that mean? Is that hyperlink? Umm and again 'Primary,' what does that mean as far as which title does it apply to? It will be nice to have that information."

## **Other Issues or Items of Note**

Users who accidentally closed out of the Site Designer. There was no error messaging warning that they would lose their changes if they didn't save, or that they would no longer have access to the Quick Theme Panel (PayGo) [Video](#)



"It's too easy to X-out of a page [with site designer]"

"I X-out of [the Site Designer], and I lose [all my changes, because I didn't save or publish.]"

Users don't know how to Test their site or Launch their event: they think Previewing is the same as Testing, and they think Publishing their site is the same as Launching their event

"I'm not sure what that means [reads test] I always test everything in preview mode anyway. So that's what I'm going to do."

Only one user had the automatic theme colors based on logo apply

"When did this change colors? I don't remember seeing it change colors, but I guess that's fine."

13 users demonstrated issues or misunderstanding with sections, although they were not specifically tested on it

"It doesn't make sense to me that you have to enter in a section before you enter in a widget, just to get the two columns."

Learnability was an issue, so consider low effort ways to minimize users' areas of confusion with additional messaging in the app (error messages, warnings), label changes (Publish), documentation (FAQs, a visual map of functionality), webinars or hands-on training

"I think a quick 1-page download guide with a few tips and tricks would be useful for new Flex users. As there are many ways to complete things, so having an understanding of the fastest or best way to do something would be super helpful. "

"I think the site designer is going to take some getting used to and will need several attempts before getting comfortable. I actually liked the "task" question features, and although I realize they're only used for this test, I think having something similar to hide or use during registration/website set-up would be nice and would be a similar feature to the little quick-step reminder button in Cvent Classic."

## Metrics Details

SUS Scores			
Legacy Experience SUS		Standard 2.0 SUS	
49.3		68.8	
+/- 3.31 at 95% confidence		+/- 9.39 at 95% confidence	
Usability: 49.8	Learnability: 47.3	Usability: 69.9	Learnability: 64.4
134 early adopter participants from screener survey		27 early adopter participants who qualified for unmoderated baseline test in Validately	

Scores closer to 100 represent a more usable system. An industry average is 68.

More Information

Ranges:

- 82 - 100: EXCELLENT
- 75 - 81: ACCEPTABLE
- 50 - 74: MARGINAL
- Below 50: UNACCEPTABLE

Questions

- I think that I would like to use this system frequently.
- I found the system unnecessarily complex.
- I thought the system was easy to use.

NPS Scores	
Legacy Experience NPS	Standard 2.0 NPS
-20	22
134 early adopter participants from screener survey	27 early adopter participants who qualified for unmoderated baseline test in Validately

A positive NPS is considered to be Good while an NPS of 50 or above is considered Excellent. The average score for software & apps = 28 (for 2015) which is the Cvent standard.

Ranges

The objective was to determine a clear and easily interpretable customer satisfaction score which can be compared over time or between different industries.

$NPS = \%Promoters - \%Detractors$

- Users who respond with a 9 or 10 are considered PROMOTERS
- Users who respond with a 7 or 8 are considered PASSIVES
- Users who respond with a 0 - 6 are considered DETRACTORS

Study Timing	
Standard 2.0 Average Time to Complete Study	Standard 2.0 Median Time to Complete Study
50:09	46:37

The study was expected to take 67 minutes.

4. I think that I would need the support of a technical person to be able to use this system.
5. I found the various functions in this system were well integrated.
6. I thought there was too much inconsistency in this system.
7. I would imagine that most people would learn to use this system very quickly.
8. I found the system very cumbersome to use.
9. I felt very confident using the system.
10. I needed to learn a lot of things before I could get going with this system.

See <http://www.measuringusability.com/sus.php> for more details on SUS.

## Task Performance Metrics

*\*Highlighted cells indicate scores below expected target performance of concern*

Total number of participants = 27

[Complete Task Details](#)

Event Setup				Flex Tasks				Review, Edit, and Launch Event		
<i>n</i> = 27	Task 1: Log in	Task 2: Create event	Task 3: Configure event	Task 4: Navigate to Site Designer	Task 5: Configure global changes	Task 6: Changes to web pages	Task 7: Changes to registration pages	Task 8: Test event	Task 9: Modify event	Task 10: Launch event
<b>Task steps</b>	warm up by logging into test account provided	set up simple event in standard 2.0 with reg types, sessions, fees, invitation lists and email alerts	add from contact types 2 reg types, 2 sessions with caps, session info, fee type	find & launch site editor	change theme, colours, fonts, add a company logo, replace background image	edit countdown timer, add website page, add location map, add text to page	navigate to & edit main reg page, chg reg type, add question	dry run, check edits	edit session, update contact field, change background image	make event live
<b>Pass/Fail</b>	Actual P/F: 27/0 Target P/F: 27/0	Actual P/F: 27/0 Target P/F: 27/0	Actual P/F: 24/3 Target P/F: 24/3	Actual P/F: 27/0 Target P/F: N/A	Actual P/F: 25/2 Target P/F: 22/5	Actual P/F: 22/5 Target P/F: 22/5	Actual P/F: 24/3 Target P/F: 22/5	Actual P/F: 27/0 Target P/F: 24/3	Actual P/F: 24/2 Target P/F: 23/3 <small>Note: This task is out of 26 participants, due to one skipped task.</small>	Actual P/F: 23/4 Target P/F: 27/0
<b>Counts of Struggling</b>	0	4	8	1	34	30	37	4	7	1
<b>Avg. Ease</b>	Not collected	Actual 4.4 Target 4.5	Actual 3.9 Target 4	N/A	Actual 3.4 Target 4	Actual 3.6 Target 4	Actual 3.7 Target 4	Actual 4.3 Target 4.5	Actual 4.4 Target 4.5	Actual 4.7 Target 4.5
<b>Avg. Confidence</b>	Not collected	Actual 4.3 Target 4.5	Actual 4.1 Target 4	N/A	Actual 3.8 Target 4	Actual 3.9 Target 4	Actual 3.9 Target 4	Actual 3.9 Target 4.5	Actual 4.5 Target 4.5	Actual 4.8 Target 4.5
<b>Avg Time on Task</b>	Actual 00:34 Target 2:00	Actual 5:54 Target 10:00	Actual 11:48 Target 15:00	Actual 00:38 Target N/A	Actual 7:15 Target 15:00	Actual 7:18 Target 7:30	Actual 7:21 Target 7:30	Actual 4:58 Target 5:00	Actual 3:37 Target 5:00	Actual 00:55 Target 5:00

## Post Activity Questions

- ? Overall, how difficult or easy was the activity to complete? (1 = Extremely Difficult, 5 = Extremely Easy)
  - ? Overall, how confident are you that you completed the activity successfully? (1 = Not At All Confident, 5 = Extremely Confident)
- 

## Methodology

Remote quantitative unmoderated testing to collect Early Adopters' interactions with a core set of tasks involved in setting up a simple event via a tool, Validately. Core tasks were created in collaboration with the PM to mirror a natural sequence of the [activities/tasks](#) our users need to accomplish to set up and launch a simple event in Event Management.

Participants were recruited from those opting into the Flex Early Adopter program, first removing any at-risk accounts, and then sending a screener survey to pre-qualify users with targeted criteria around their usage, industry, role, and range of demographics.

Twenty-seven of the targeted 30 completes was achieved, an incentive of \$100 was provided.

### Objective

Establish a quantitative baseline for core tasks involved in a simple event set up with Flex Standard 2.0 to track and measure over time.

### Study Dates

- 10/25/17: Initial screener survey sent to a small sample of about 307 Early Adopter participants to confirm survey and Validately are working as expected.
- 11/03/17: Screener survey sent to full list
- 11/10/17: Incentive offer email sent
- 11/24/17: Study closed

### Version Tested

FLEX 0.3.2

[Video that shows defaults the first time opening the Site Designer](#)

## Participant Targets and Details

There were 27 completed studies, 3 fewer than the targeted goal. 292 Flex Early Adopters who opted into research, along with 8 referrals from these customers, were recruited via a screener survey. Participants were incentivized with \$100 Amazon gift card for any completed unmoderated session. A draw of all those who completed the screener survey and opted into the research but did not qualify was done for one participant.

The majority of the participants are: female, between 25-44 years old, work in government/associations/non-profit/educations industries (GAN E), hold a Cvent Admin role, have more than 2 years experience with Cvent, have played around with Flex to try it out, have personally launched between 1-4 events in Cvent, and planned between 1-9 events.

The below-targeted criteria were established to recruit the most appropriate users with a good mix of industry, roles, and demographics. Targets were mostly achieved with the greatest discrepancy in 4 males compared to 23 females, 7 participants represent ages 18-24 and 45+, some experience launching an event around using Flex, and less representation from other three role types which together totaled 10.

### Participant data

[Link to Participant Videos](#) (*Videos are confidential information, please do not share videos*)



	Targeted Criteria for Participants	Actual Participants Completed
<b>Gender</b>	Males = 10 Females = 20	Males = 4 <b>Females = 23</b>
<b>Age</b>	25 - 45 years = 15 Anything else = 15	<b>25 - 45 years = 23</b> Anything else = 4 <a href="#">Full List</a> 18-24 = 1 <b>25-34 = 15</b> 35-44 = 8 45-54 = 1 55-64 = 2 65 + = 0 Unknown = 0
<b>Industry</b>	Corporation = 18 GANE = 12	Corporation = 10 <b>GANE (government, association, non-profit, education) = 15</b> TPP (third-party planner) = 2
<b>User Role</b>	Some from each: Planner = 8 Admin = 8 Specialist (registration/web builders, IT support) = 8 Director = 6	Planner: I own the delivery of events assigned to me from beginning to end = 6 <b>Admin: I am the Cvent System Administrator, "the go-to person" in my company for all things Cvent = 17</b> Specialist: I help with or own a specific area of expertise, such as; setting up event registrations & websites, creating mobile apps for the event, creating marketing assets to promote the event = 2 Director: I oversee staff/departments responsible for meetings and events, making sure we are delivering on program goals = 2
<b>Cvent Product Experience</b>	Under 2 years = 15 Over 2 years = 15	Under 2 years = 13 <b>Over 2 years = 14</b> <a href="#">Full List</a> Less than 1 year = 8 1-2 years = 5 2-5 years = 8 5-10 years = 3 More than 10 years = 3
<b>Flex Experience</b>	Early Adopters	<b>I've played around with it to try it out = 13</b> I've used it to create an event/registration website = 4 I've launched an event/registration website created with Flex = 5 I haven't used it yet = 4 None of the above = 1

<b>Events they Launched in Cvent any version</b>  <b>(last 12 months)</b>	Reference, these are at an aggregated account level, versus an individual user level:  Thresholds at account level: Extreme (100+ events) = 5 High (20 - 99 events) = 5 Medium (6 - 20 events) = 10 Low (1 - 5 events) = 10	0 = 0 <b>1-4 events = 9</b> 5-9 events = 5 10-20 events = 7 21-50 events = 1 51-100 events = 4 100+ events = 1
<b>Events Personally Planned</b>  <b>(last 12 months)</b>	No targets established	0 = 1 <b>1-4 events = 7</b> <b>5-9 events = 7</b> 10-20 events = 6 21-50 events = 2 51-100 events = 2 100+ events = 2
<b>Bookings</b>	High value = 15 Not high value = 15	<b>High value bookings = 22</b> Not high value = 5

## Raw Data

- [Baseline Box Folder](#) with all assets, including:
  - ["Golden Copy" Excel Spreadsheet](#) with data by participant and task, including demographic data and success rates and timings.
  - [Annotations Excel Spreadsheet](#) - cleaned annotation data based off video tags and broken by tasks.
  - [Folder](#) with all Raw participant videos