

**MyDealBook.com**  
**Usability Study Report**

## **SURVEY SUMMARY**

There were 104 responses to the survey. Full results can be viewed at [url removed].

### **Responses by user segment**

	<u>Responded</u>	<u>Sent</u>	<u>Rate</u>
Non-users	6	4905	0.12%
New users, non-NYC	17	732	2.32%
New users, NYC	20	1255	1.59%
Abandoned, non-NYC	18	947	1.90%
Abandoned, NYC	7	1002	0.70%
Power users, non-NYC	20	371	5.39%
Power users, NYC	16	319	5.02%

### **Top responding professions (from survey question)**

Consultant	10.6% (11)
Developer	8.7% (9)
Commercial Sales	7.7% (8)
Investor - Individual	7.7% (8)
Commercial Mortgage	6.7% (7)
Marketer / Publicist	6.7% (7)
Insurance	5.8% (6)
Residential Sales	5.8% (6)
Architect	4.8% (5)

### **Key observations**

Of 98 respondents who are account holders, 4.1% say they don't have an account, and 3.1% say they've never been to the site.

Selected responses regarding the purpose of MDB:

- "To connect people in the same line of business, but I don't see how deals are made"
- "It's a bit vague, seems at odds with the name"
- "Not very clear"
- "Connects buyers & sellers of real estate"
- "It was unclear initially that this was a real estate driven site"

Responses about the meaning of "Commercial Real Estate Directory" mainly referred to a "list" of people in a "phone book" or "Yellow Pages" sense. Some responses mentioned lists of properties, or sale/lease listings. Very few encompassed all of MDB's functions (and these were potentially led to that response by already knowing the purpose of the site).

Types of groups respondents are most interested in joining:

- Networking groups (90.8%)
- Professional associations (73.6%)

## USER INTERVIEWS / WEB MEETINGS

### Users interviewed

[names removed]

### Key observations

- Search selections from drop-down menus are tedious (selection of city, profession, property type, etc.), and the same selection is often repeated for subsequent searches
- If given the option in the search form, users would frequently choose multiple selections for profession, property type, etc.
- After conducting a People search, users tend to click to the Profile page of many results looking for key pieces of information (such as contact information, property types of interest, neighborhoods of interest) before deciding whether to take action.
- “Deals” is viewed primarily as a section for buying/selling or leasing, and is compared to broker sites and LoopNet.
- Users expect the text box in the search form to search more than the name of a person, name of a deal, etc.
- The links that appear below the top tabs are overlooked. These include the “What’s Happening” and “My Notifications” links on the Home tab, and the links for “Recently Updated...,” “In My Network...,” etc. under the other top-level tabs. The same may apply to the search bar that appears in the Profiles section, although there weren’t enough observations to be conclusive.
- Users consider most of the notifications under “What’s Happening” and “My Notifications” to be irrelevant, because they don’t know the people, the notifications relate to a different geographic region, etc.
- Messaging regarding meaning of “connection,” “contact,” “network,” etc. is inconsistent / unclear.
- If user is in interior of site without being signed in, “Sign Up” function is “below the fold” and not very prominent.

### Other observations

- Other than the potentially misleading phrase “Commercial Real Estate Directory” on the non-logged in index page, the site’s real estate focus isn’t immediately clear in internal sections.
- Users had no problem editing their profiles, although some weren’t aware of what types of information could be added until they went to the profile editor.
- Most users understand the purpose of the “Out of Network Invitations” and “Out of Network Messages” counts on the left side below the main left navigation bar (although some misunderstand the messaging to mean, e.g. “invitations received.”) However, most don’t notice this section unless it’s pointed out to them.
- For new users, the purpose of top-level tabs and corresponding sections is sometimes unclear -- especially “Deals.”
- Except for the search box, users seem to overlook actions/functions in the right column (e.g. Add New Deal).
- On the “My Notifications” page, everything in the center column except the Notifications sections is “below the fold,” and users make assumptions about the page as a whole based on only the one section.
- Observed from my own use of the site: Once I reached 5 connections, I received a “People Directory unlocked” message, although I didn’t observe any change in what I was able to do on the site. Is this an old function that has been removed?

## RECOMMENDATIONS

See appendix for earlier “Profile Recommendations”

### Minor projects

#### *Search results*

- For each “mini profile” that appears in the People search results, include icons showing whether the person has included a phone number (telephone icon) or external website (cursor-hand icon?) in their profile.
- On all search result pages, show number of results and pages of results (with links to page 1, page 2, etc.)
- Fix minor text display bug in search results (see image)

#### *Out-of-network contacts / invitations*

- For each “mini profile” that appears in the People search results, include a JavaScript Invite/Message function. When activated, it would open a small window showing “Out of Network Invitations” and “Out of Network Messages” available, options for a personal message, etc.
- Consider removing “Out of Network Invitations” and “Out of Network Messages” from left side (unless people are clicking it and it’s actually resulting in network growth).

### *Terminology / messaging*

- Clearly define “connection,” “contact,” “network,” and standardize throughout site. Suggestions (same as LinkedIn):
  - Contact – someone you know, whether or not they have a profile on MDB
  - Connection – someone who has a profile on MDB to which your own MDB profile is directly connected
  - Network – (noun) Connections of your Connections (or their Connections, ad infinitum) to whom you are not yet directly connected
- If seeking to promote the networking, collaboration, and other aspects of the site, consider eliminating messaging related to “Commercial Real Estate Directory” except when specifically referencing site sections intended to function as a “Yellow Pages” list of people / service providers.
- Once some slogan/messaging is established for the main idea of the site to replace “Commercial Real Estate Directory,” include this in the main header throughout the site.

### *Left navigation*

Overall the left navigation section isn’t bad, but could use some refinements. Some general suggestions regarding user expectations/intuition:

- Inbox should include invitations received
- Contacts group should include a link that is clearly for adding contacts/connections
- The Messages page looks as if it can be used for sending messages to email addresses; it isn’t clear that it’s only for messages within MDB.

### *Miscellaneous*

- For non-logged in users, move “Sign Up” and “Sign in” functions to top header. Include messaging to show that membership is free.
- Include links to help pages, or JavaScript help pop-ups within each main section, to show, e.g. “What is a Deal?” or “What is this section for?”
- On sections for which content can be hidden or displayed using +/- signs, also include “hide” and “show” messaging
- In the profile creation/edit process, clearly point out that the headshot photo is in the Professional Summary section. (You may want to check your database to see how many headshots have been uploaded to the Photo section.)
- I see the Photo section is now visible in user profiles. However, it shows “Added by You” in other people’s profiles.

## **Major projects**

### *Search forms*

Use JavaScript and other advanced coding to allow the following in Search forms (possibly with two levels of complexity, split into “basic” and “advanced” search):

- Multiple selections from search fields (possibly a left/right column setup for available/included)
- Add text field to search keywords in addition to item name (or integrate in single text search field)
- Option of limiting search results to “My Network,” etc.
- Search parameters should be displayed either within the search form, or clearly marked on another part of the page
- Search parameters should be considered filters that can be removed/applied as needed to expand/refine results.
- Examples: PropertyShark’s Comparables and Forcs searches
- Example: Go to <http://tinyurl.com/mydealbook-3>. The “You are here” section shows currently applied filters that can be removed. On the left side are additional filters that can be applied.

### *Navigation / page layout of main sections*

Remove links directly below main tabs and replace with an alternate page layout. One possible alternative is illustrated in the attached mockups. Suggested sub-tab labels and content for each main section:

- Home
  - What's Happening
  - My Notifications
- Deals
  - Browse Deals
    - Recently Updated Deals (all MDB)
    - Deals Matching My Interest Settings
    - Deals In My Network
    - My Deals
  - Search Deals
  - Add New Deal
- People
  - Browse People
    - Recently Updated Profiles (all MDB)
    - People Matching My Interest Settings
    - People In My Network
    - My Connections
  - Search People
  - Grow Your Network
- Events
  - Browse Events
    - Recently Updated Events (all MDB)
    - Events Matching My Interest Settings
    - Events In My Network
    - My Events
  - Search Events
  - Add New Event
- Groups
  - Browse Groups
    - Recently Updated Groups (all MDB)
    - Groups Matching My Interest Settings
    - Groups In My Network
    - My Groups
  - Search Groups
  - Add New Group
- Jobs
  - Browse Jobs
    - Recently Updated Jobs (all MDB)
    - Jobs Matching My Interest Settings
    - Jobs In My Network
    - My Jobs
  - Search Jobs
  - Add New Job

*Notifications ("What's Happening" and "My Notifications" sections, possibly also for future email updates)*

Filter and consolidate various notifications (with possible future refinements using new profile data). Suggestions:

- People
  - Only show "X is now connected to Y" if either of them is one of the user's direct connections
  - Only show profile updates if person is one of the user's direct connections
  - (Idea, not vital) In new user signup, offer option of announcing self to MDB community, including services offered, deals involved in, etc., which would appear in "What's Happening..." to all users. Only in this case would an out-of-network "X has joined MDB" notification appear. From the profile page where this option is selected, have a link to "Where does this appear?" so they can see it in action.
- Events
  - Show new/updated events in user's locations of interest
  - Show that event is occurring in X days
  - If attendee is one of the user's direct connections, show that attendee signed up
  - Other than in-network attendees, only show # of people who signed up for event since last last logon ("10 more people have signed up for BlahBlah Networking Event")

- Deals
  - Show new/updated deals for user's locations, property types & deal types of interest
  - If participant is one of the user's direct connections, and deal isn't private, etc., show that person is participating
- Groups
  - Show new groups in user's locations of interest
  - If one of user's direct connections joins group, show that person joined
- Jobs
  - Show new/updated jobs of user's locations of interest

#### *Miscellaneous*

- Expand options for "Deals" to more easily encompass projects other than buy/sell/lease.
- For Deal creation and searches, add fields for basic property data (square footage, etc.) and price
- Email digests – consider building a notification system through which users get daily or weekly digests of network activity. This would encourage users to return to the site.
- Moderation of Groups to allow selectivity in accepting members
- To encourage profile completion, build a "% complete" notification, similar to that used by LinkedIn. This could potentially be shown in the mini-profile for People search results. (User psychology: "If I'm only clicking on the ones that are X% or more complete, so are other people; I should complete my profile.")
- Research interest in allowing companies to bulk upload People (employees) and Deal info. Jessica Paindiris at Massey Knackal is interested in such a process.

## **Appendix - Profile Recommendations (reported earlier in separate document)**

### **Main data fields**

- Profession(s) (allow multiple)
- Location(s) of interest (allow multiple)
- Property type(s) of interest (allow multiple)
- Activities of interest (buying, selling, finding for-lease, offering for-lease, lending funds, borrowing funds, finding equity financing, providing for-fee services, connecting with others in my profession, etc.)

For *each* of the fields above, allow users to enter keywords separated by commas. Should offer examples/suggestions (e.g. for locations, they would select major cities, and be offered the keyword field with examples such as “Upper West Side,” “Park Slope,” etc.)

These will be extremely valuable when you build more advanced search functions, for refining “ticker” updates to be more relevant, for displaying better summaries for individual search results, etc..

### **Building network**

It would be useful for the final step of profile creation to be adding contacts/connections, and consistency of terminology should start here. Clearly define “contact,” “connection,” and “network.”

The current messaging in the bulk upload box is very confusing for users. Get rid of the heading, “Connect with the MyDealBook Community.” Label it as “Import Email Contacts” or some such. Also remove the messaging, “There are more than 300,000 real estate professions on MyDealBook...Find out who you are connected to instantly.” It should be clearly communicated in the initial messaging that...

- This is a way to quickly invite many contacts
- It will import your contacts to an on-screen list
- From that list the user can see who is already on MDB
- The user can choose who from the list receives an invitation to join or connect on MDB

### **Other**

- The current profile setup doesn’t let users see what types of information \*can\* be shown in the profile until they go to the profile editor.
- “Photo” section in profile editor doesn’t appear in live profile. This should be made visible, but labeled such that users understand it isn’t their headshot. This could be used for sample projects, etc.
- Does the system currently allow multiple email addresses per account (ala LinkedIn)? If not, it should. One user commented that they did a bulk upload from Outlook, and that some of their contacts weren’t shown as being on MDB, even though this person knew they were. I assume it’s because it was under a different email address.
- When viewing another person’s profile, the contacts section displays as “My Contacts.” This is confusing; they think it’s their own contacts rather than those of the person whose profile they’re viewing. It should either just say “Contacts,” or “So-and-so’s Contacts.” (Actually, isn’t “Connection” a more consistent use of social networking terminology in this instance?)
- Put a link to the profile editor in the “My Account” page
- Consider creating a sample profile page for “Mr. Deal Book” that everyone is automatically connected to. This would let them see how a full profile should look. (You could also expand this idea to sample deals, sample events, etc., to which the sample profile is connected. However, users have noted that the updates they get for people, deals, etc. are often irrelevant and need to be refined. The sample setup could throw off any such refinements you implement. Perhaps show deals, events, people, etc. that appear through Mr. Deal Book only to new users, and then cut it off after they reach X number of real connections? It may be too tricky to get this right, just an idea...)