

Yahoo Ad Manager Plus Help Center

Usability Study and Findings

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About the Study

I conducted two usability studies of the YAM+ help center:

- A September 10, 2015 study with an EMEA partner platforms team
- A September 16, 2015 study with a NAR platform PM team

There were six participants in total, and the study included the following methodologies:

- Before the study, I asked each participant about the level of experience they had with the YAM+ help center.
- Participants were asked to perform four information-seeking tasks.
- After each task, participants were asked to rate the difficulty of the task, given the information in the current help center.
- Participants were asked four post-study questions that sought general feedback about the help center.

About the Participants

Six Yahoo employees participated in the study:

- Two EMEA Audience Ads Optimization Analysts
- An EMEA Platforms Partner Manager
- A NAR Platform Project Manager
- A NAR Platform Project Manager II
- A NAR Project Manager, Platform Operations

Familiarity with the Help Center

The six participants varied widely in their familiarity with the help center:

- One participant had never opened the help center.
- Three of the participants had used it a few times.
- Two users who regularly access certain articles.

When asked about their familiarity with the help center, participants said the following:

- EMEA1: Has used the help center a few times. Has accessed the *Creating Audiences* article (SOL2065) and *Reads the product updates. I filed bugs and want to see if the bugs got fixed.*
- EMEA2: Vaguely remembers using the help center when they started with Yam Plus but can't remember which articles.
- EMEA3: *I use it sometimes for things that I'm not sure about...I don't manage creatives, but sometimes have to answer questions about creatives so I go to the KB for that. I sometimes have other more technical questions, such as macros that we can pass in an ad. I go to the KB for that. More specific things that you don't use every day. I do not rely on the help center for things I do every day, like creating a campaign.*
- NAR1: Has only used the help center a couple of times, is *not super familiar.*
- NAR2: *This would be my first time.*
- NAR3: Has only accessed the help a few times. *Yam Plus is new to me as well.*

Feedback on the Tumblr-Hosted Content

This part of the study asked participants to provide feedback on a Tumblr mockup at yamphelp.tumblr.com because the Tech Pubs team wanted to evaluate alternatives to the current Oracle KB. We have since decided not to pursue a Tumblr-hosted help center, but the feedback is interesting to note.

All participants have a Tumblr account. One EMEA participant created a Tumblr account for a Dublin sales conference. All three NAR participants created Tumblr accounts at the request of their management for a “Hacks Day” event. Participants use Tumblr for the following:

- *Sports blogs*
- *Hobby photographs*
- *Silly stuff (like) following Tumblr’s 10 funniest posts*
- *Cars, pictures and videos*
- *To scroll through other users’ postings*
- *Conferences*
- *I have played around on other groups’ Tumblrs*
- *We had people contribute what they were doing in different offices*

Because the Tumblr mockup did not include search, all of the study tasks were completed in the regular Oracle KB, except the last task. For the last task, *Find Out How Yam Plus Works with Auctions*, the content was not yet in Oracle, so I had the participants look at the Tumblr mockup to get feedback on that content.

EMEA Participant 2 preferred the Oracle KB over the Tumblr mockup:

I do like the way this (Oracle KB) is presented. It’s very clear. Rather than this one (Tumblr pilot). It doesn’t seem as clear cut as this one (Inquire). Clicks on popular topics. It just seems like straight away...what you need to do.” And the help (points to search box) is quite clear as well. Basically I prefer the looks of this (Inquire) page much, much more.

The NAR participants, on the other hand, preferred the Tumblr mockup’s layout because you could see the entire TOC on every article. Here are some quotes:

- *I think it’s easier to find information than the help center in Backyard. I just liked how it was formatted at the top with the tabs. Having different sections was really helpful. It looked like there’s more information than what’s in backyard. (NAR Participant 1)*
- *I like the dropdown here if we’re looking at the Tumblr section it’s really easy for me to see what falls underneath each. And I like that quick glance view...That seems a bit cleaner to me...I would like a dropdown here (in Inquire) in the Yam Plus help center. (NAR Participant 2)*
- *Yeah, I did see the Tumblr and I liked the way the Tumblr was broken out a little bit better and it seems a little bit more thorough. Here (Inquire help center) I’ve just gone to a couple of pages and not really found what I was looking for. (NAR Participant 3)*

- *Well that's why I like the Tumblr because you can have a dropdown, and you can look at that dropdown really quickly. So instead of having to go here, and then here (clicking popular topics) and then maybe it's in here but then I have to go like this or like that (expanding subheads on SOL3312). It's easier when you have a dropdown, and you can look at the dropdown, look at the options and say "oh this is what I'm looking for."* (NAR Participant 3)

User Tasks

Participants completed information-seeking tasks and the help center provided varying degrees of effectiveness.

Task 1: Find Out Why a Creative Was Banned

For the first task, participants were asked to use the help center to find out why a partially banned creative was banned on some exchanges.

The information on creatives was located in these articles:

- *Upload Creatives* (SOL2063)
- *Link Creatives to Lines* (SOL2060)
- *Ad Exchange Policies* (SOL3318)
- *Set Up Ads* (SOL3283), a hub article with a link to *Upload Creatives* (SOL2063)

With *Upload Creatives* (SOL2063) being the article with the most information on creative bans.

Task Paths:

- EMEA Participant 1 Looked for "creative status" information under Campaign Setup, and selected *Set Up Ads*. Went back to the Campaign Setup menu and chose *Upload Creatives*. Did not see creative status information. Back to *Set Up Ads* and then *Link Creatives to Lines*. Searched "creative." From search results page, clicked *Ad Exchange Policies*. Back to search results, then *Set up ads*. Scanned Related Articles. Back to *Upload Creatives*.
- EMEA Participant 2 searched "banned creative" and did not find anything but clicked *Upload Creatives* and found the best information available.
- EMEA Participant 3 searched "creative" but would look under *Set up Ads* because the creative ban might have something to do with the ad setup. The information was not in Set Up Ads, so the participant hovered over Related Articles and selected *Upload Creatives* from the links on the hub topic.
- NAR Participant 1 did not access the help center, and expected to find information in the platform.
- NAR Participant 2 accessed the platform first. If they checked the help center, they would search for "creative," "creative failing audit," and "banned creative." Chose *Upload Creatives* from the search results.

- NAR Participant 3 did not access the help center, and expected to find information in the platform.

On a scale of 1-7, where 1 is difficult and 7 is very easy, participants rated this task a 3.9.

Task 1 (Banned Creative)	
EMEA Participant 1	4
EMEA Participant 2	3
EMEA Participant 3	5.5
NAR Participant 1	2.5
NAR Participant 2	5
NAR Participant 3	3.5
AVERAGE RATING	3.9

The Help center has been updated to address the confusion about the Creative Alerts topics being under *Upload Creatives*. The new article title is *Work with Creatives*. Further work plans include adding in-app help about creatives, and adding more troubleshooting information to the help center.

Task 2: Project Inventory for a Specific Demographic

For the second task, participants were asked to find information on projecting inventory for a particular demographic. The best way to project inventory would be to use the Forecaster. There is one article on the Forecaster *Projecting Inventory Using the Forecaster* (SOL3316).

Task Paths:

- EMEA Participant 1 looked for forecasting information on the Audiences tab, and then searched “forecast.” The top search result did not have any text underneath, so the participant did not see it. Clicked *Overview of Targeting* and there, via Related Articles, to *Line Item Targeting*, and then *Target Demographics*. Finally, went to participant’s line in the platform and found the forecaster there.
- EMEA Participant 2, after being bounced to the main help.yahoo.com page, went to the Audience tab in another browser window. Clicked *Create and Manage Audiences*, then *How do I Create an Audience Based on Data*. Scrolled through the audiences article trying to find information on forecasting. Landed on the subsection *How Do I View the List of Audiences?* Searches for “size of audience” and from the search results, navigates back to *Create and Manage Audiences*, then *Audience Data Types*. After a colleague whispered “forecasting,” the participant went back to the help home page, checked all the tabs except

Targeting, and started to type “fore” into the search box before finding *Projecting Inventory Using the Forecaster* (SOL3316) under the Targeting tab.

- EMEA Participant 3 searched “inventory,” looked at the results, opened a different tab that displayed Overview of Targeting, and opened another tab that had *Projecting Inventory Using the Forecaster* (SOL3316) open. Commented that forecasting is not really about performance. It’s more about reach. So the article title was misleading.
- NAR Participant 1 started searching “predict invent” and then changed to inventory forecast” and then opened *Projecting Inventory Using the Forecaster* (SOL3316). In discussing the task, would search “predict avails” or “predict available impressions.”
- NAR Participant 2 went to Audience Builder in the platform, then tried creating a line, hoping to find forecasts there. Went to help and searched “avails,” and got no answers. Then tried “forecasting” and got bounced into help.yahoo.com. Tried searching “forecasting” again and got irrelevant results about Yahoo Weather. Switched browser windows to get to the Yam Plus help center. Searched “forecasting” and clicked *Overview of Targeting*; from that article page, clicked *Estimating Targeting Performance Using Forecasts*.
- NAR Participant 3 clicked an item on the platform Dashboard page, selected a line, clicked the Audiences tab on the right side of the page, and looked for a way to set up targeting there. Then, clicked the Help link and searched “inventory.” Selected *Overview of Targeting* from the search results page; from that article page, clicked *Estimating Targeting Performance Using Forecasts*.

The Help center has been updated to address the confusion about the article title *Projecting Inventory Using the Forecaster*. The new article title is *Projecting Reach Using the Forecaster*. Further work plans include duplicating this article under the Audiences tab.

Participants had gained some experience with the Help center layout from having completed task 1. That factor may account for a higher rating for task 2. On a scale of 1-7, where 1 is difficult and 7 is very easy, participants rated this task a 4.4.

Task 2 (Project Inventory)	
EMEA Participant 1	6
EMEA Participant 2	4
EMEA Participant 3	2.5
NAR Participant 1	4.5

NAR Participant 2	5.5
NAR Participant 3	4
AVERAGE RATING	4.4

Task 3: Report on Campaign Performance

For the third task, participants were asked to find information on how a campaign is doing against goals. The best place to look for information would be the Campaign Report article (SOL2239).

Task Paths:

- EMEA Participant 1 immediately clicked the Reporting and Analytics tab in the help center, and clicked the Campaign Report link in Related Articles.
- EMEA Participant 2 went straight to the Reporting and Analytics tab, clicked Campaign Report, expanded the article *What is the Campaign Report?* but did not see the section *Create, Share, and Edit a Campaign Report*.
- EMEA Participant 3 searched for “goal” and looked at the search results. *None of these is leading me to the place where I want to go.* Back to the help Home page, browses headings, clicks the *Dashboard* article (SOL3282).
- NAR Participant 1 looked for information in the platform by selecting an advertiser, a campaign, and then a line, and looking at the metrics in the table. This gives a “quick eye glance at how things are going.”
- NAR Participant 2 went to the platform Advertisers page, and clicked an advertiser to view their campaigns. Expected to be able to set goals on the Campaigns page, and then see the goal and stats with clear information on whether the campaign is within its goal or “discrepant.” Tried drilling down to the line level, and could not figure out what the KPI is for a line. Then, searched “goal performance.” Clicked *Campaign Report* (SOL2229) from the search results page.
- NAR Participant 3 went into the platform and landed on the Campaigns page. Clicked a line and went to the Lines page. When prompted to find more granular information, went to the Insights tab and chose Campaign Explorer.

On a scale of 1-7, where 1 is difficult and 7 is very easy, participants rated this task a 4.3.

Task 3 (Campaign Report)	
EMEA Participant 1	7
EMEA Participant 2	4
EMEA Participant 3	2.5
NAR Participant 1	6.5

NAR Participant 2	3
NAR Participant 3	3
AVERAGE RATING	4.3

Task 4: Find Out How Yam Plus Works with Auctions

For the fourth task, participants were asked to find information on how bidding and pacing works in Yam Plus. The information was only available in the Tumblr help center. There was only enough time for four participants to look at this section. All four found the information right away because it was in its own tab (Bidding and Pacing). I was seeking feedback on the information because it was in progress at the time. Here is what participants had to say about the section:

- EMEA Participant 1: “I’m trying to find the word “auction” on this page but I can’t see anything about that. That type of wording needs to be included somewhere. “ Also, it needs to discuss the second price auction, and how to maximize win rates.
- NAR Participant 1 Thought it might be under *Work with Exchanges* if it wasn’t under *Bidding and Pacing*. Did a “Control-F” to search for the word “auction” and nothing came up. It needs more information such as how to win auctions, how to win more inventory, how can I adjust my bid price to get more of what I want? And if I make a change, when does it take effect?
- NAR Participant 2 went to *Bidding and Pacing*, but associates “auction” with ad serving rather than bidding. Looked for information on *How do I increase my likelihood of winning the auction?* or *Improving performance* and *Next Steps* or *FAQs* that give more troubleshooting guidance.
- NAR Participant 3 *would automatically go to Bidding and Pacing. I could see Bidding and Pacing, but also Ad Exchange Policies...this is really good info on what happens between an ad call and a bid response. Obviously not having the ad banned is really important. And having a good price is important, and understanding how all this stuff works. there isn’t really any information on what I can do to make sure that I have a good price or...it’s not exactly clear what I should be doing to make sure that I win all the auctions that I can. So just tying back to steps that I should be taking.*

In the interest of time, the EMEA participants did not complete or rate this task. For the NAR participants only, on a scale of 1-7, where 1 is difficult and 7 is very easy, participants rated this task a 5.2. This was the task that participants rated the highest.

Task 4 (Bidding and Pacing)	
EMEA Participant 1	N/A
EMEA Participant 2	N/A

EMEA Participant 3	N/A
NAR Participant 1	6.5
NAR Participant 2	3
NAR Participant 3	6
AVERAGE RATING	5.2

Findings

The following findings emerged from this help study:

- 100% of Participants Needed Prompting to Find the Help Center
- 50% of Participants Encountered Performance Issues with the Help Center
- 50% of Participants Found the Tabbed Interface Confusing

100% of Participants Needed Prompting to Find the Help Center

There is no link to the YAM Plus help center in the help center, and users need to know that the help center exists in order to access it. Though two of the participants had seen the help center previously, all four needed assistance to access it.

- Participant 1: bullwr
- bullet

Status: In Progress

This finding is being addressed as follows:

- The Documentation team rolled out a new help center and did the following:
 - Set up a simpler URL: <https://help.yahoo.com/adv/yahoo-ad-manager-plus>
 - Redirected the old help center to the new help center
 - Updated the yo link: yo/yamplus-help
- YAM Plus product team is working on YAMP-811, which adds a Help link in the platform.

Status: Unresolved

I brought up the issue with the CCOPs team, but they said that they could not reproduce the problem.

Recommendation: Monitor the Issue

If performance problems continue in production, file a CCOPs ticket to improve the performance of the new help center.

Status: Resolved

The Documentation team rolled out a new help center that no longer uses the tabbed interface. The old help center URL redirects to the new help center at: <https://help.yahoo.com/adv/yahoo-ad-manager-plus>.

Additional Insights

This section includes general impressions of the Help center that participants expressed during a brief post-study question and answer session.

Overall Impression of the Help Center

If you were describing this help center to someone who had never seen it before, what type of words would you use to describe the information, layout, and overall ease of use?

- EMEA Participant 1: *A knowledge base where you can navigate through and learn about the topics related to Yam Plus, with examples, explanations, screen shots...It should provide every user with support and it's there to answer your questions. I won't say it answers all your questions. It's something that needs to grow.*
- EMEA Participant 3: *Provides the basics of the platform; how to do the basic things to run campaigns. Instead of having information on things like how you create audiences and what's the logic behind that, how you would go about optimizing these campaigns, different operations that are done on this platform I wouldn't recommend it. You train them on how to upload creatives, but if they forget, they can come here and it's well explained, step-by-step what you have to do to upload a creative.*
- NAR Participant 1: *I personally like the fact that you have screen shots. It's good to see what the screen looks like, and what button you need to click. I appreciate having that added in here. I'm a visual learner myself. I think it spells it out pretty easily for the user.*
- NAR Participant 2: *(It has) a pretty clean presentation for how they discuss content or topics; there are some good visuals there, some step-by-steps, so I think it's all in all it's probably a helpful resource without question, and something I'm more inclined to use moving forward as I try to teach myself more about Yam Plus.*
- NAR Participant 3: *Quick, organized, thorough, in depth, easy.*

Help Center Goals

Just looking at the help center, what do you think is the primary goal of the instructions?

- NAR Participant 1: *Kind of walking through a user in the sequence that you would set up a campaign from beginning to end. From the starting general information you need to know how to do things and then ending with reporting and analytics. I would assume that this would be honestly more geared towards*

a first-time user of Yam Plus or a novice user of Yam Plus vs. an advanced user. I think an advanced user would reference this if they had forgotten something, or if needed to double-check...am I right about this thing that I've been thinking all along?

- *NAR Participant 2: I think that for troubleshooting...a lot of people look...for information like "how does this work?" "How do I set something up in the system?" But I feel like for a lot of hands on keyboard buyers, they...if they're seeing an issue they're just immediately going to try to escalate to their account manager to solve. But maybe if there was a specific tab that said Troubleshooting then they'd be more likely to use it.*
- *NAR Participant 3: I think the goal is to 1) give background into how Yamplus works and 2) help advertisers or buyers with setting up campaigns and working in Yamplus.*

Help Center Audience

Who do you think is the intended audience of this help center?

- *EMEA Participant 1: Yam plus users. Not sure whether it's the analysts because we get a lot of information coming from various stakeholders EMEA-wide. I think Analysts. Platform teams. But also our co-managed clients. They would find it quite helpful. Especially beginners. They would benefit a lot from this site.*
- *EMEA Participant 3: I think this will be mainly for external clients, users outside Yahoo using Yam Plus. Internally, we have other ways of training users without relying on this platform, and I think this is actually good for external clients.*
- *NAR Participant 2: I think it's really for hands on keyboard buyers. Anyone internal I would expect that they have more detailed documentation or their own training resources available to them to help troubleshoot. So I would think that this help center is really for a hands on keyboard buyer that yes, has been trained on the system through a few in person demos with their account manager or account director. But this is just like constant reminders and very simple, basic how tos.*
- *NAR Participant 3: I'd definitely say OSs, the ones managing these campaigns, and it seems like this probably could be for someone who's "hands on keyboard (users) as well."*

Information Relevancy

Do you think there is too much information, not enough information, or just the right amount? What, if anything, should we add or remove?

- EMEA Participant 1: *The bidding article...there was nothing about second price auction. I couldn't even find the word auction. I was there when (the help) was relatively new. It seems like there is much more articles now, which is good to see.*
- EMEA Participant 2: *I like the screen shots because it helps me to know that I'm looking at the right thing, which is helpful. I like the way the information is presented. There is a lot of plusses (collapsible subheads) everywhere, so it's a matter of finding the right one. I don't like navigating to the whole of Yahoo help.*
- EMEA Participant 3: *I think there's the right amount of information in some cases, like the creative article is very complete. I think that the article that talks about macros is very complete. The article that talks about targeting is complete in the way that it explains for you the targeting and the data types that we've got in the platform. But then there are areas like what we've seen in the dashboard side ... the Dashboard article here is quite short. I think that it can have more information in this case.*
- NAR Participant 1: *Well the bidding and pacing...it's interesting because the rest of the tabs have a solid amount of information underneath each one except for bidding and pacing. So it's kind of weird to have that as a separate tab. Although I like the callout because it probably doesn't really fit into anything else. It is strange that there would only be one thing under here.*
- NAR Participant 2: *I would add more shortcuts, and links to content that's closely related so that a user doesn't have to try to navigate on their own in the event they've reached a page that maybe doesn't have the exact answer that they want. I think that there's enough here. I feel confident that there are troubleshooting steps contained within here. It's just not as called out. And so I have to drill into these different sections. I would like a Troubleshooting tab here (to the right of Reporting and Analytics) or within each category.*
- NAR Participant 3: *I think the hands on keyboard users just really need the information that they aren't going to be able to get from being an internal user. Things like how certain processes work, like this bidding process probably gives them a lot of information...but I'd say the next thing is really best practices, how can you set yourself up for success? I think information like that is always received really well.*