Agriculture Futures Programme Usability Testing Report

30th January, 2015 - Marianne O'Loughlin & Andrew Sedlak

The Scottish Government
Riaghaltas na h-Alba

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Executive summary

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Executive Summary (1/2)

This report summarises the findings from the first and second round of customer usability sessions for the Rural Payments site.

These sessions focus on the following areas of the site:

- The homepage layout and content
- The user registration
- The user business registration
- Location and map details
- Submitting a Standard Application Form online

Key insights include:

- **Understanding key processes -** Some participants were not clear how to proceed with simple tasks such as registering a business, how to associate an advisory firm with their business, or confirm details during application submission.
- **Functionality -** In many cases during form filling, the site asks for basic information but can lead to confusion through difficulty. Help text can be confusing or missing from specific form fields. Users are also being asked to understand functionality that does not follow a clear model, with little instruction on how to use it.
- **Visual hierarchy -** Participants spend more time sorting through details due to a subtle visual hierarchy. Including unclear language and help text when visual cues play an important role in clarifying information and confirming details.

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Executive Summary (2/2)

Key insights include (continued):

- **Understanding the application process -** Participants found the Single Application Form (SAF) unclear on what details they should be using or what they are being asked to do in the process.
- **Language, acronyms/jargon -** Participants were mostly confused by the use of acronyms, business jargon, and lack of clear help text in appropriate areas. The combination of these issues creates an overall business friendly yet non-customer friendly understanding of the site.
- **Risk of errors -** Although this was not specifically called out during testing by farmers, agents verified farmers are more likely to be overly cautious when submitting a SAF due to the risk in losing funding. This can be a mental burden during the application process and does impact the overall user experience if the online process is challenging.
- **Mapping -** Both farmer and agent participants are very happy with the mapping tool. Only minor suggestions were made to make this an even better experience in later iterations.

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Our priorities

The top priorities for this project include:

Functionality

- Help in creating a site that is operationally robust

Usability

- Confirming all users are able to move their business to the new online portal
  - Allowing for a seamless transition of the client/agent relationship to the new online portal
  - Empowering farmers in managing their own business online - giving them reassurance, security, and accuracy of details
- To identify any accessibility issues or barriers with the new portal*
- To identify any usability issues or barriers that impede registration and successful SAF submission

Customer experience

- To make the process of applying for subsidies easier for farmers
- Establishing a pre-existing or new business on the system is easy to understand and complete

*An accessibility report has been completed by Nile and delivered during the project timeline

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Methodology

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Methodology

1:1 moderated session

12 participants were tested using the live web portal and interactive screenshots of the SAF application journey.

- Each session lasted approximately one hour
- All sessions followed an outline script moderated by Nile consultants
- All 10 participants were tested on the live site and also using interactive screenshots
  - 5 participants were Scottish farmers
  - 5 participants were Agents
  - 2 participants had access requirements*
    - One with severe blindness
    - One with severe dyslexia

Accessibility requirements

*Nile has performed an Accessibility Review of a selection of key journeys within the Rural Payments portal which is a stand alone document. This review consists of:

- Registering a new business
- Re-registering an existing business
- Registering an advisory firm
- Re-registering an existing advisory firm
- Browsing the location map

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Participants: Day One

Gender	Working Status	Job title
M	Full time	Agent - RSPB
M	Full time	Farmer/Business Owner
M	Full time	Semi-retired doctor/Farmer (Amateur)
F	Full time	Farmer (Partner)
F	Full time	Farmer (Helps neighbours with online tasks)

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Participants: Day Two

Gender	Working Status	Job title
M	Full time	FBR - Land Surveyers
M	Full time	Agent - Environmental Consultant
M	Full time	Agent
F	Full time	Agriculture Consultant/Farmer
F	Full time	Agriculture Consultant/Farmer

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Perceptions of use

Although no formal request was made to fill participant's experience quotas, the user sessions provided a mix of mid-experienced farmers and agents to high-experienced farmers and agents, with a range of technical ability ranging from low to high levels.*

*Note - these points were generated by the perception of the viewing group and do not represent any set data points.

Insight & recommendations

1. Homepage & User Registration
2. Business Registration
3. Locations & Mapping
4. Single Application Form Walkthroughs

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Issue Classification

Positive note - This is to call out any positive aspects of the website users were particularly happy with.

Issue - Low risk - This issue should be dealt only after higher risk usability issues are resolved.

Issue - Medium risk - This issue should be dealt with as a priority and will impede on the usability of the website.

Issue - High risk - This issue should be dealt with as a major priority and may seriously impede on the usability to of the website. It is advised to address all high level issues as a primary goal.

Our recommendations - This denotes considerations the Nile team may have after speaking with the Scottish Government teams, participants, and debrief sessions.

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Homepage & User Registration

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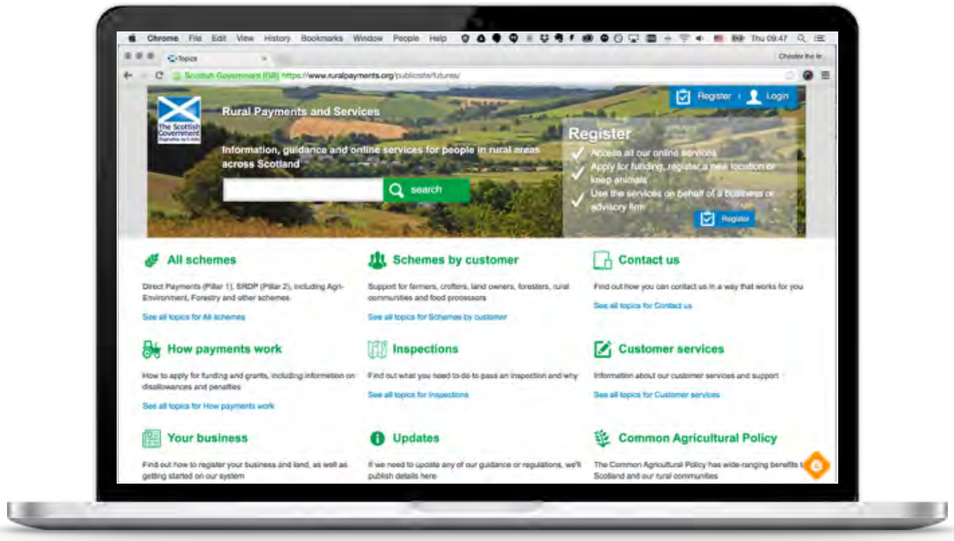
The homepage is well received

Positive - Participants are happy with the homepage, specifically commenting on the layout and content as being both clear and relevant

- **Hero image/registration placement -** Participants responded well to the hero image and registration/login placement. Most could easily navigate to the content they were interested in exploring.
- **Content placement -** All participants felt the content featured had a place on the homepage. Some found social media and calendar events and would browse this as a secondary area.



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Registration is quick, but has its issues

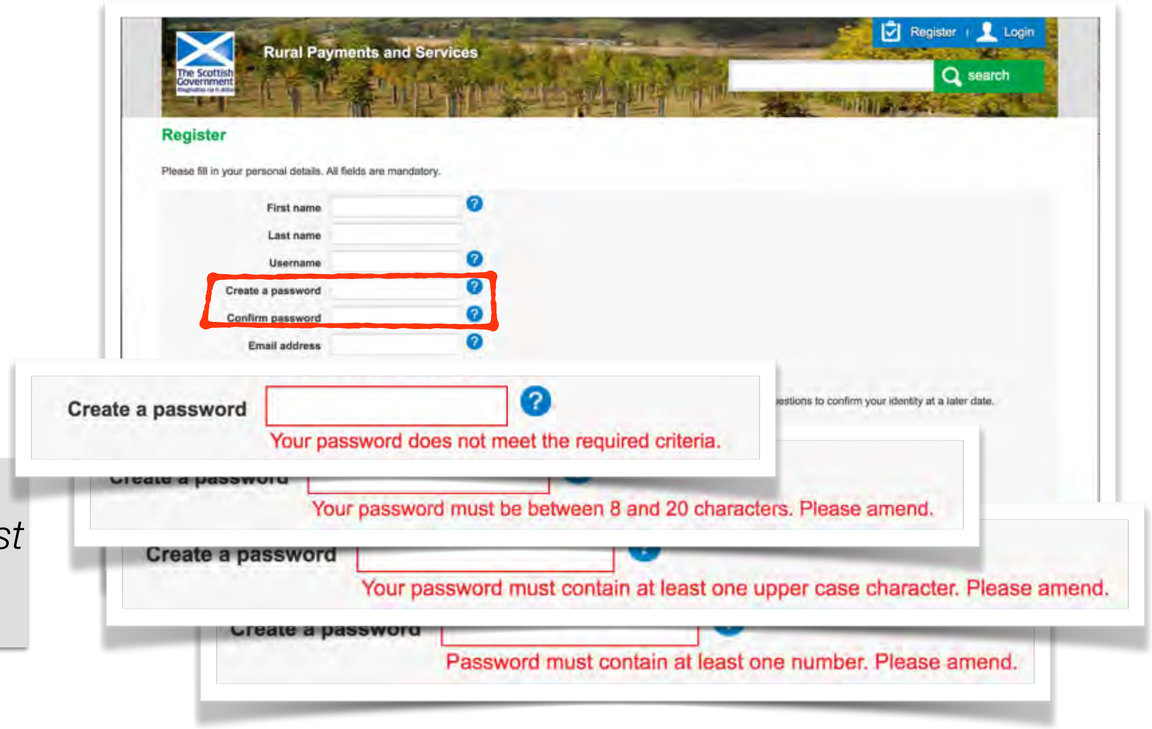
Medium - The error messaging does not provide users with enough information

- Specifically the password entry field requires four attempts to understand how to input characters.

Our recommendations

Consider placing this full description as visible help text instead of an error message.

Example: *"Your password must be 8-20 characters long and contain at least one number and one upper case character."*



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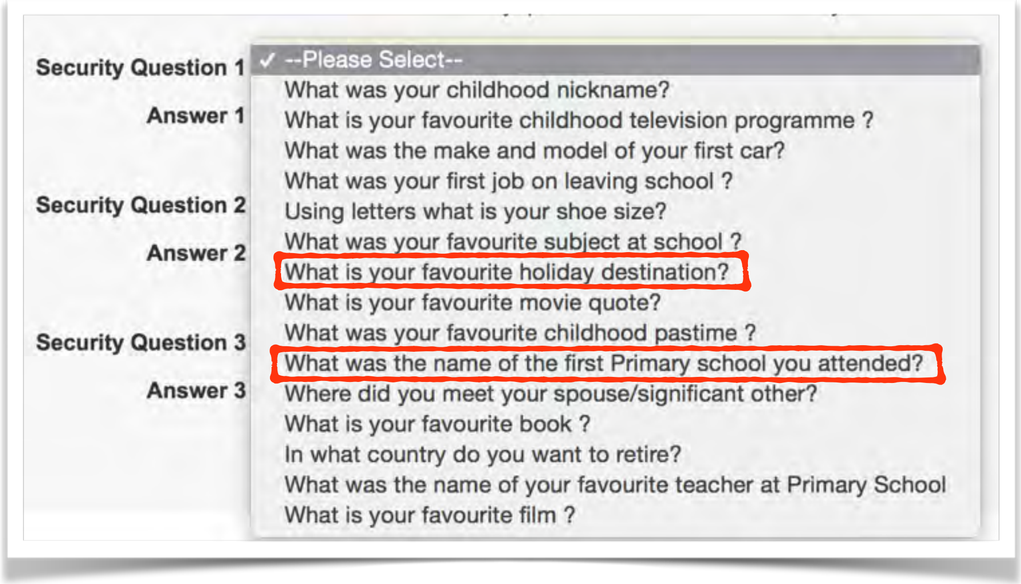
Registration is quick, but has its issues

Low - The security questions are subjective, which may lead to more confusion in the future

- Certain answers such as a Primary School teacher are unquestionably factual while others such as a favourite destination can change over time.



Our recommendations

Consider lowering the number of choices to those questions that contain unquestionably factual answers, and basing questions solely on non debatable answers.

Examples should follow the criteria of being: Safe, Stable, Memorable, Simple, with Many possible answers.

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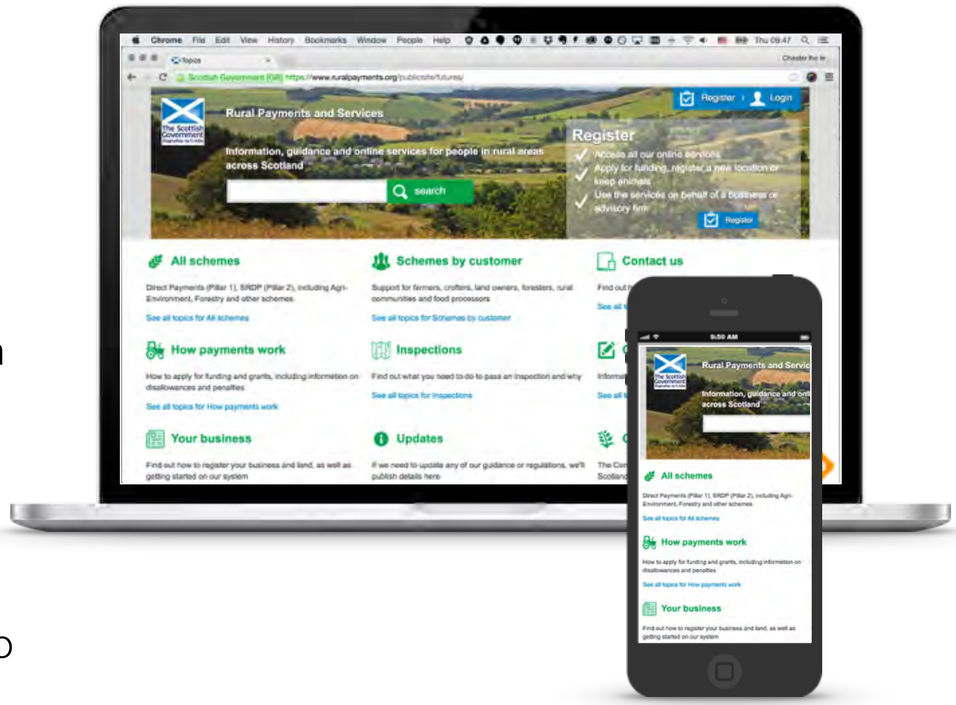
The know Safari browser issue

High - Users are not able to access the Rural Payments website on the Safari browser

- Without proper explanation of this issue, many users who use Safari as their default browser will not understand why they cannot access the website
- This also includes all iOS users (iPhone & iPad)
    - Note - the small sample of farmers we spoke with described tablets such as iPads as being their preferred device.



Our recommendations

Until the build version can support Safari web browsing, consider explaining to users on the homepage that if they are using Safari or iOS devices, they will need to change browsers (also Chrome & Firefox are free Apple Store downloads)

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Business Registration

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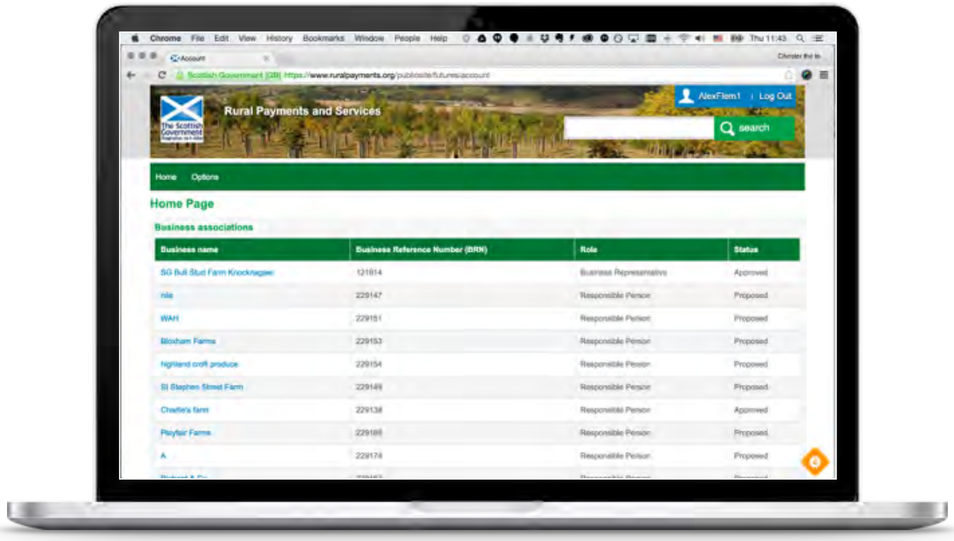
Business registration has minor issues, adding to confusion

Although little high risk issues were found with the registration process itself, many smaller issues accumulate confusion for users

- **Understanding how to register -** Some participants are not clear how to register a business with the move from old portal to new. Some participants are unclear how to associate an advisory firm with their business. Most issues may be resolved with help text and guidance.
- **Functionality -** In many cases the site asks for basic information but can lead to confusion through difficulty using form fields set up without help.
- **Language, acronyms/jargon -** Participants were mostly confused by the use of acronyms, business jargon, and lack of clear help text in appropriate areas.
- **Visual hierarchy -** Participants spend more time sorting through details due to a subtle visual hierarchy. Including clear language and help text, visual cues play an important role in clarifying information and confirming details.

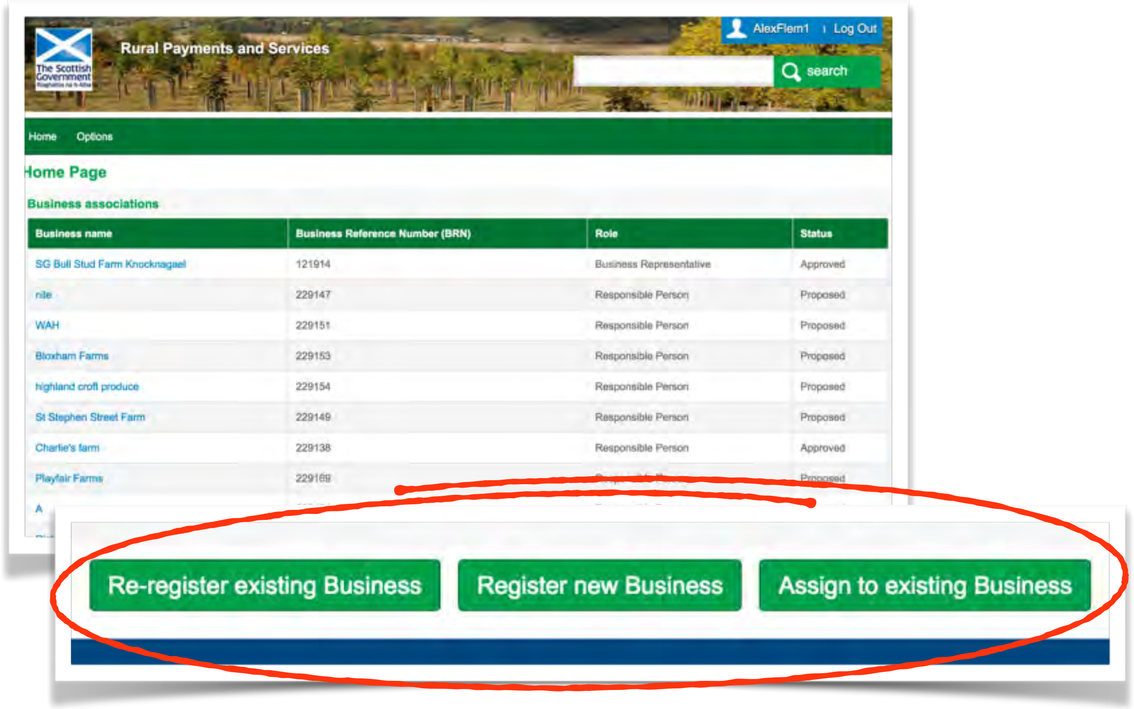


Unclear whether to register or reregister

Low - Participants did not understand which option was right for them

Our recommendations

Include bracketed test to give a short description of each potential option.



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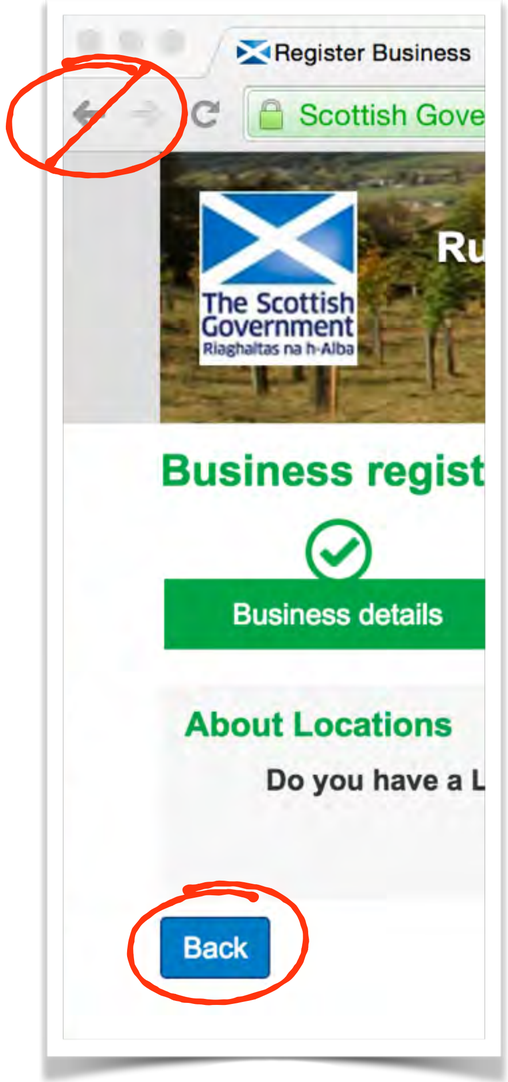
Users unable to move backward using the browser buttons

Medium - Users may find this breaking up their process and may not consider using the Back button on screen

Doing so results in jumping to the beginning of the registration process, and bypasses the stages previously filled out.

Our recommendations

Along with allowing this functionality, also consider adding page links to each Stage Header as a failsafe for users to return to



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Form fields have no criteria displayed on screen

Low - Forms without criteria posted in or near entry fields consistently produced error kickbacks

- Without a standard to go by, participants choose any preferred method to filling out the fields provided

Our recommendations

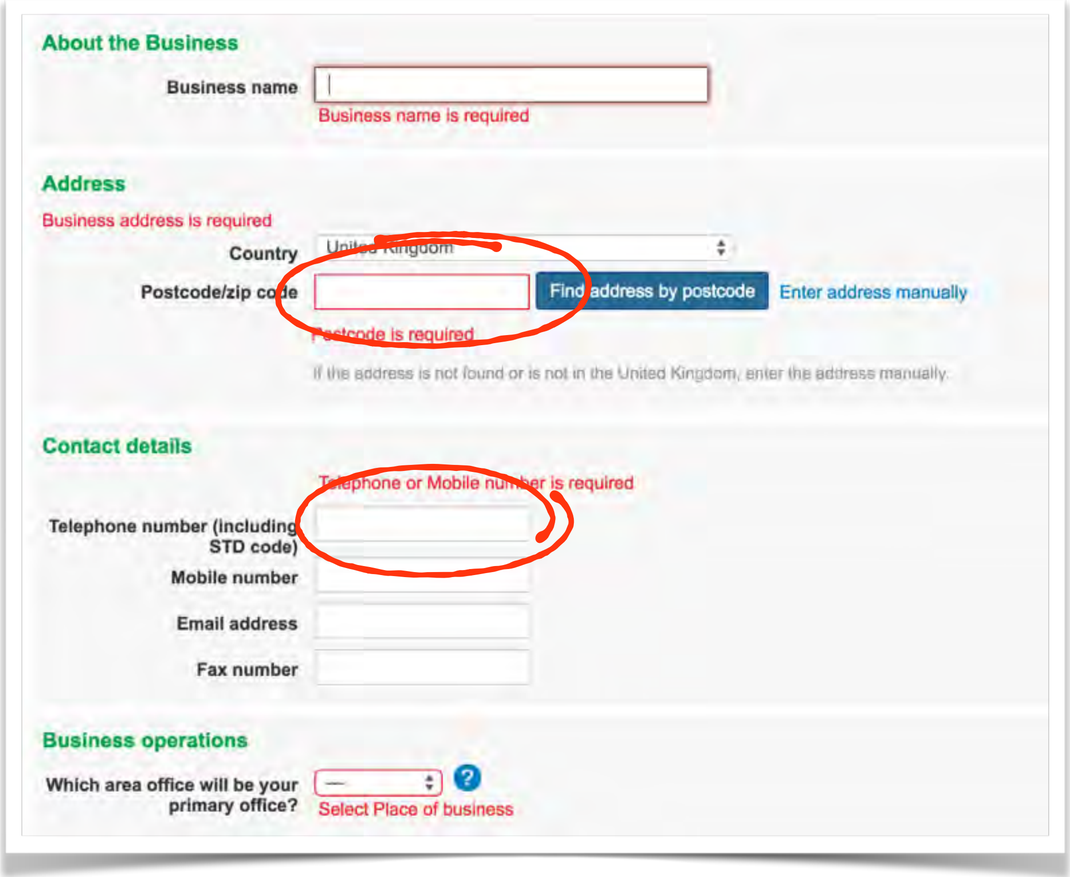
Consider adding light grey text in brackets along the form.

To go one step further, break apart the entry fields to component parts.

Example: (Do not include spaces in your phone number)

-or-

Tel Number: [xxxx] [xxx] [xxxx] **vs.** *[ ]*



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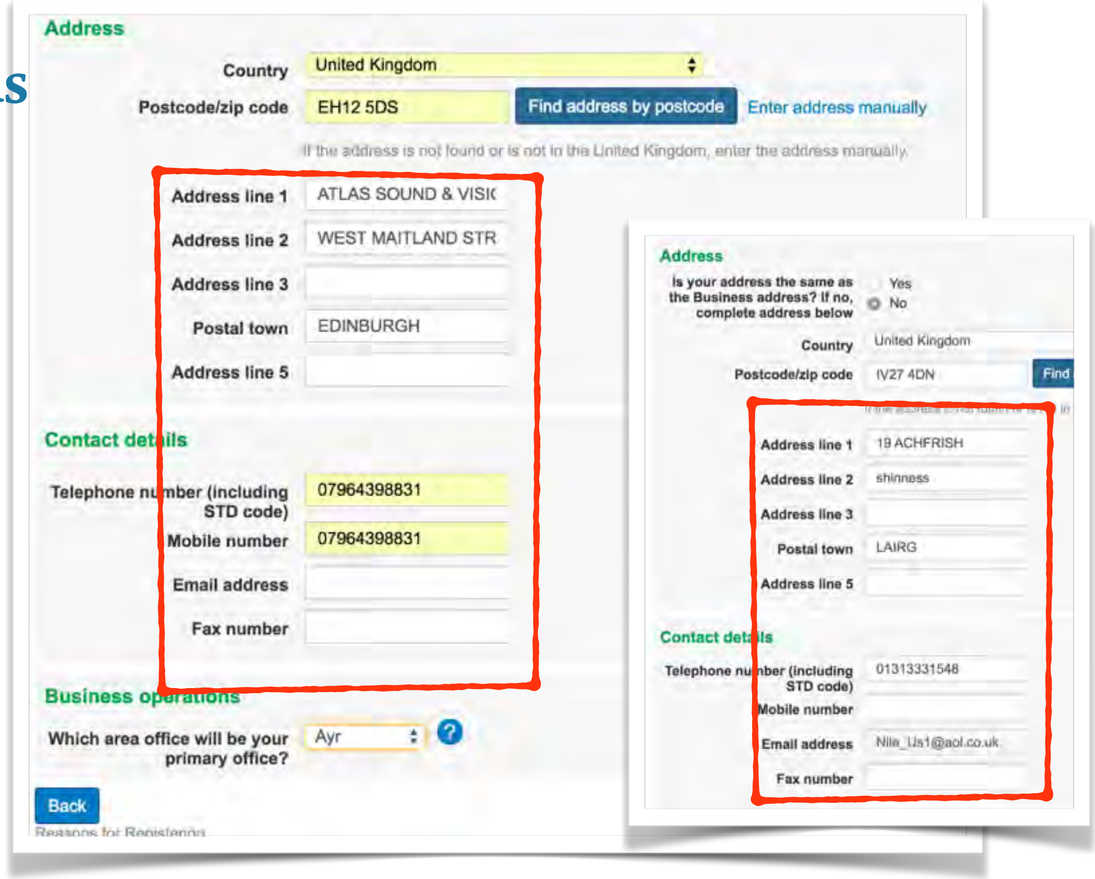
Form filling unclear which fields are mandatory or optional

Low - Participants may not fill out the required fields and receive an error kickback



Our recommendations

Consider adding text on near the entry field to signify which items are mandatory. This quickly signifies required information for the system.

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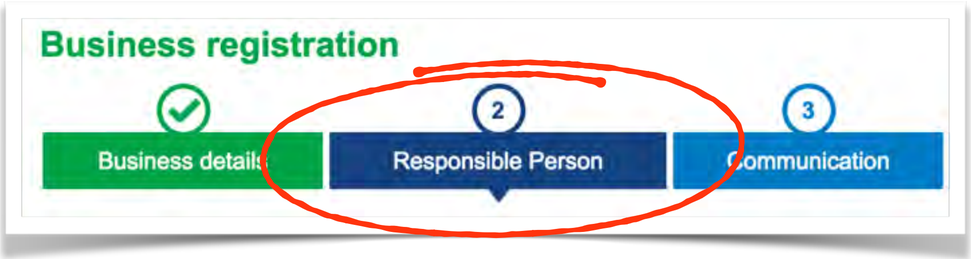
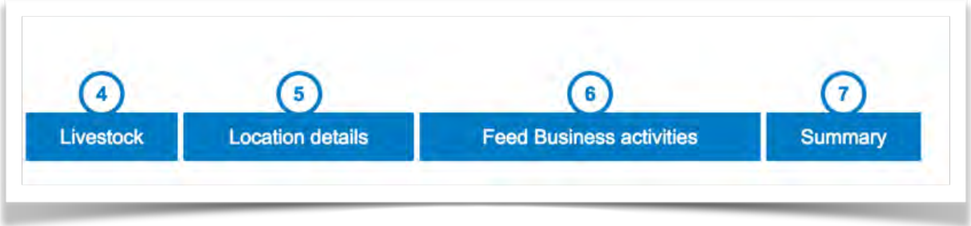
There is no explanation of stages within the registration process

Low - Participants do not have a clear understanding of what information they are entering and when





Our recommendations

Consider adding a descriptive text to address what action is needed for each of the stages in the process.

Example: “Please provide the details of the legally responsible person of this business.”

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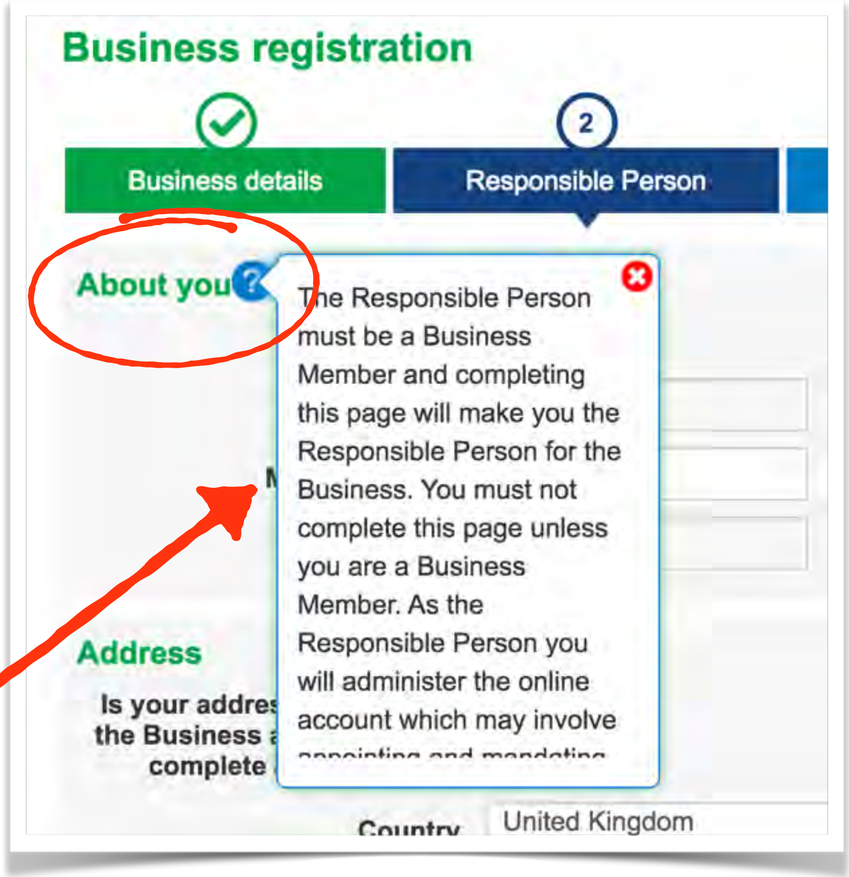
Responsible person details are unclear and not explained

Medium - Participants are unclear who the Responsible Person is or what their role is

- **Lack of Clarity -** The form suggests users are filling out details about themselves, but the Stage Header suggests it is the Responsible Person. The user is not yet familiar with this role and may not choose to look for help (stopping the chance of he/she understanding what the role is).

Our recommendations

- Consider changing the section title **"About You"** to **"About the Responsible Person". -or-** Making it clearly stated up front that by choosing to register this business, he/she assumes the role of the responsible person
- Also refine the copy in the help text to insure greater clarity around the role of the Responsible Person



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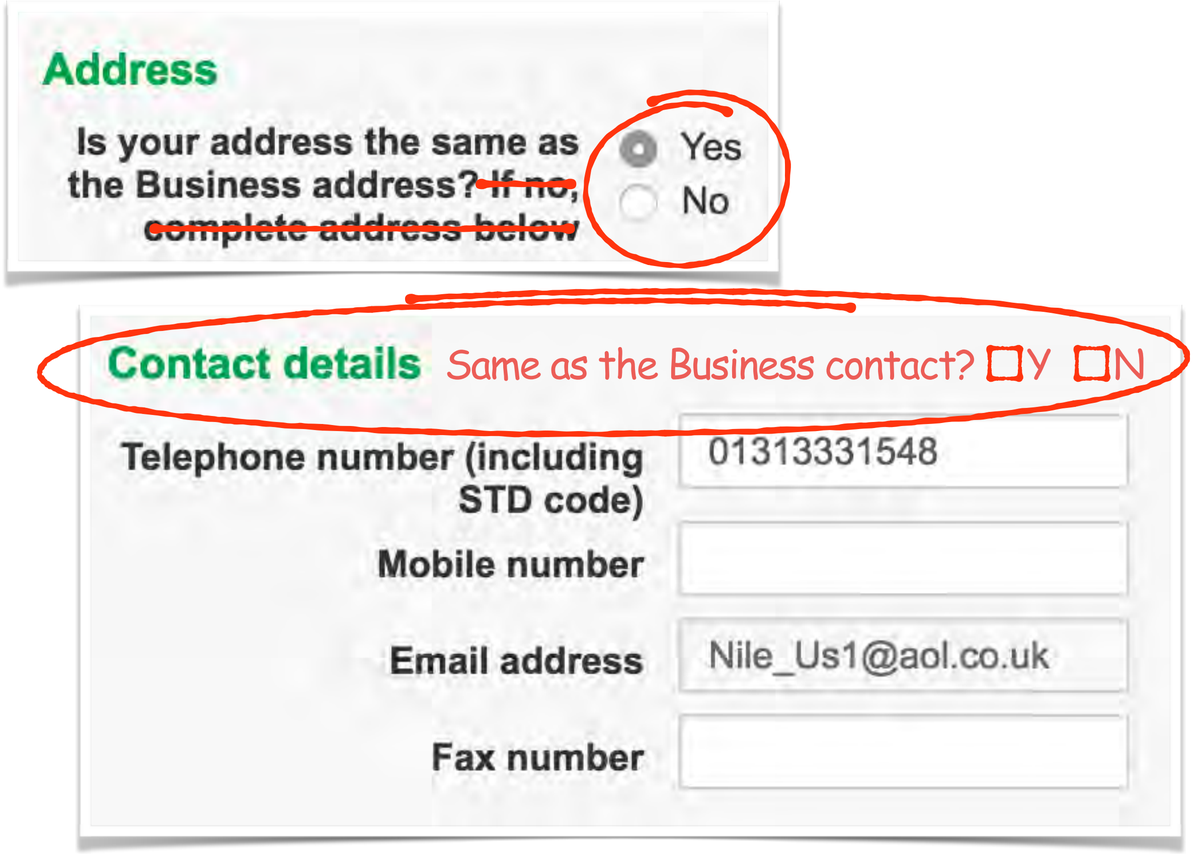
Duplication of fields confuse participants

Low - All participants were unsure why they had to duplicate the address & contact details during registration

- Participants were confused as to why they were entering “duplicate information” when many users’ address and contact details would be the same as their business address

Our recommendation

- Consider dropping the second sentence of the Address Input question
- Reveal the appropriate fields once answered *(Reveal pre-populated if Yes and cleared if No)*
- Ask the user if their **Personal** Contact Details are the same as their **Business** Contact Details, and pre-populate with previous data if answer is Yes.



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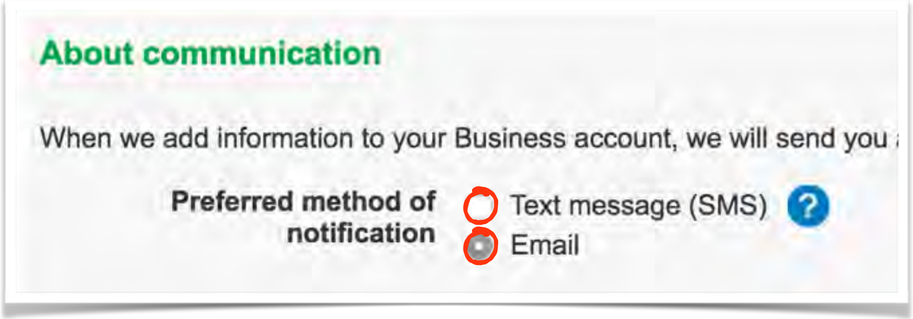
Participants want the option to choose all communications

Medium - Participants would choose both email and SMS options as connectivity can be an issue on the job

- Due to connectivity issues on the job, participants would look for both methods of communication to ensure they have received a message. Currently SMS based messaging is not supported on the RuralPayments site.



Recommendation

- Once the SMS option goes live, allow for both method to be selected

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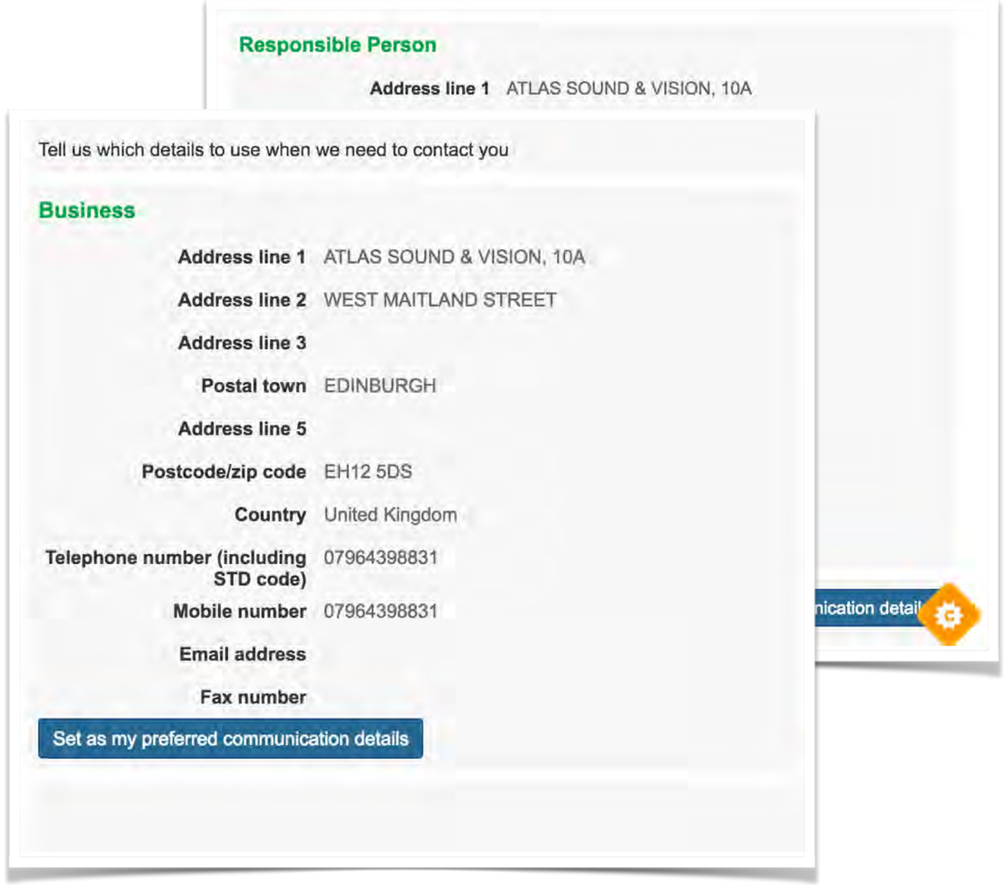
Communication options are unclear and do not provide support (1/2)

Low - Participants did not understand why they must choose between communication details

- **Usability -** If the Business & Responsible Person details are identical, users would not expect to choose between these options. If they are different, there is more reason to have a selection at this stage
- **Description -** It is not clear that users may either use the provided details **-or-** add different contact details
- **Call to action -** Participants are not sure which CTA to select at this stage



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Communication options are unclear and do not provide support (2/2)

Recommendation

- Ask the question ***"Which details would you like to use when we need to contact you?"*** to ensure users understand they are being prompted
- Give all potential options equal weight so users understand which options they have

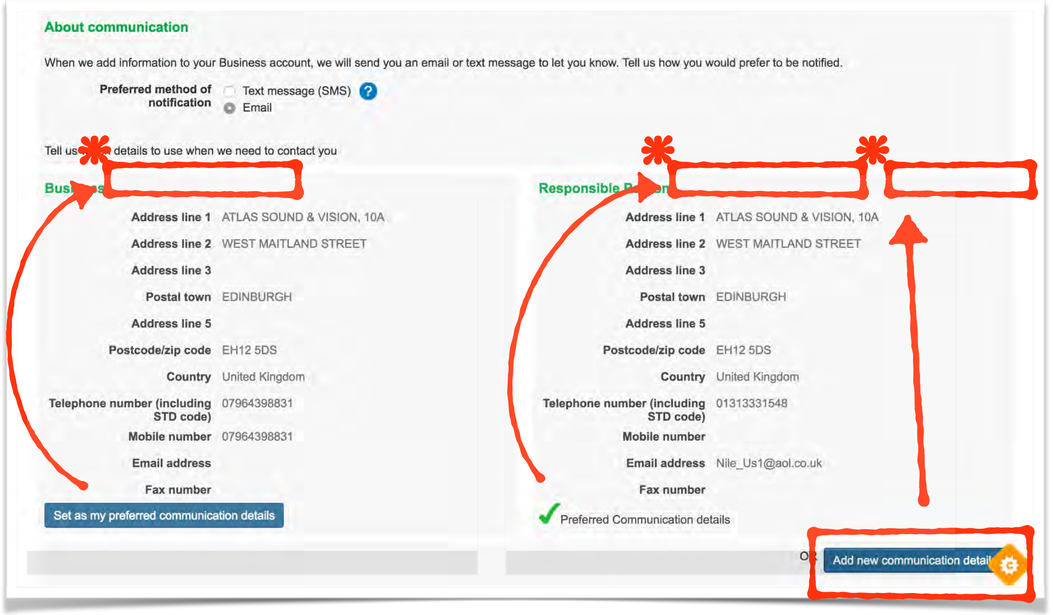
Example:

1. Set these details as my preferred contact details (Business)

2. Set these details as my preferred contact details (Responsible Person)
-This would only be required if the Responsible Person details are different

3. Create new preferred contact details

- Give potential options more visual difference to allow users quick understanding they are looking at different items



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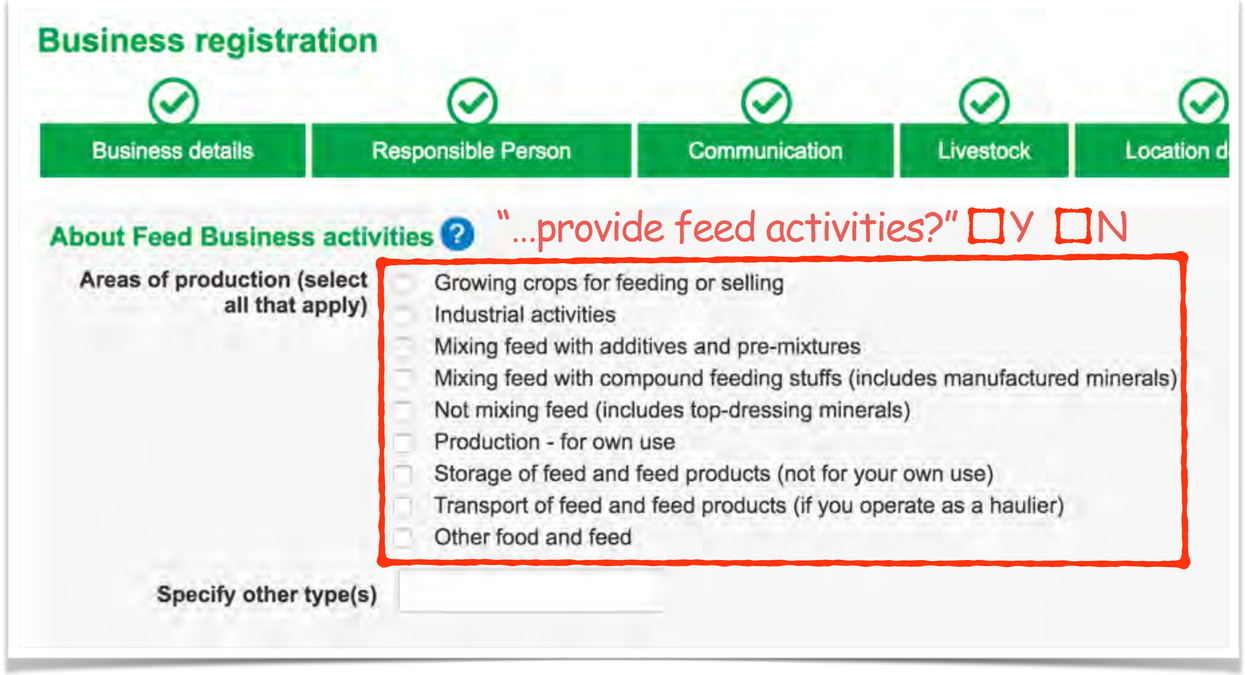
Feed Business Activities are unclear to participants

Low - Participants are unsure how to proceed when encountering this stage

- Those users who do not participate in feed business activities do not understand the relevancy of this page.

Our recommendation

- Consider phrasing the section as a question first, ***"Does your business provide feed activities?"***
    - If answered **Yes**, show areas of production
    - If answered **No**, move to the next stage



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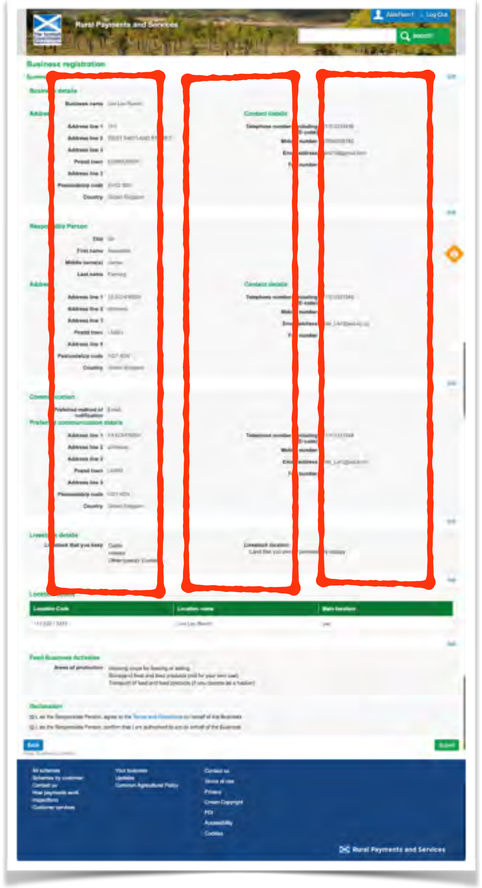
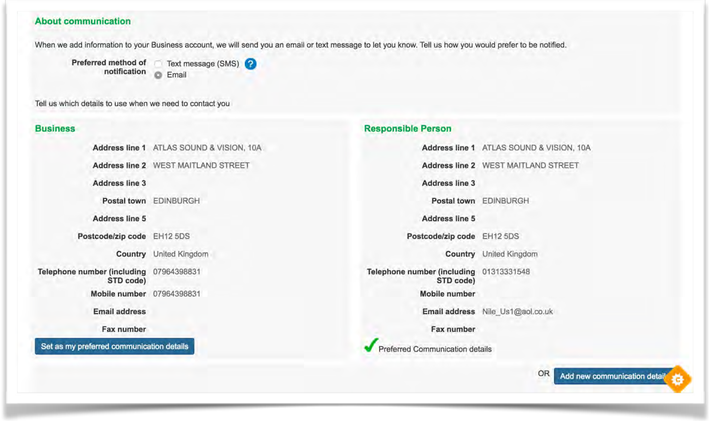
Summary panels have no clear visual difference

Low - Visually consistent patterns may aid in user understanding of details they have entered

Our recommendation

- Show summary of information vertically to mimic other detail pages previously seen





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Double checkbox is often missed

Low - Users do not expect two checkboxes to be present (subconsciously this looks like a choice)

Our recommendation

- Considering the Responsible Person page informs users they are taking on the role, is a declaration more useful at the Responsible Person Stage? One checkbox could be present in Stage 2 and the Terms & Conditions checkbox presented here.

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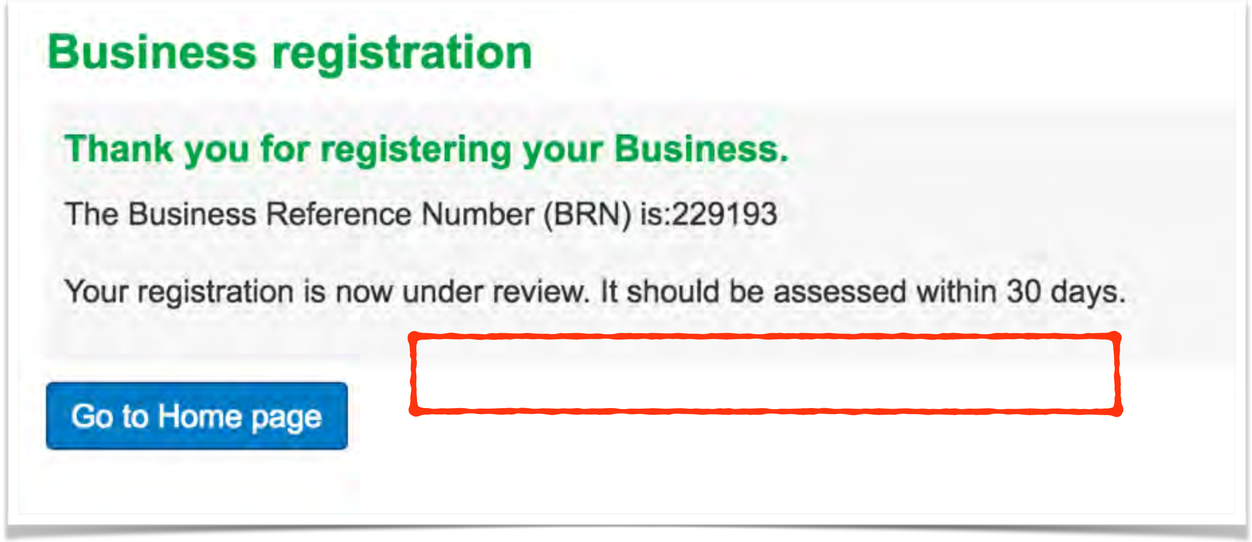
No confirmation of followup contact

Low - Participants do not know what to expect next as there is no prompt

Our recommendation

- As a followup email will be sent to the user, add a sentence to explain an email will be sent out to the address provided with this information



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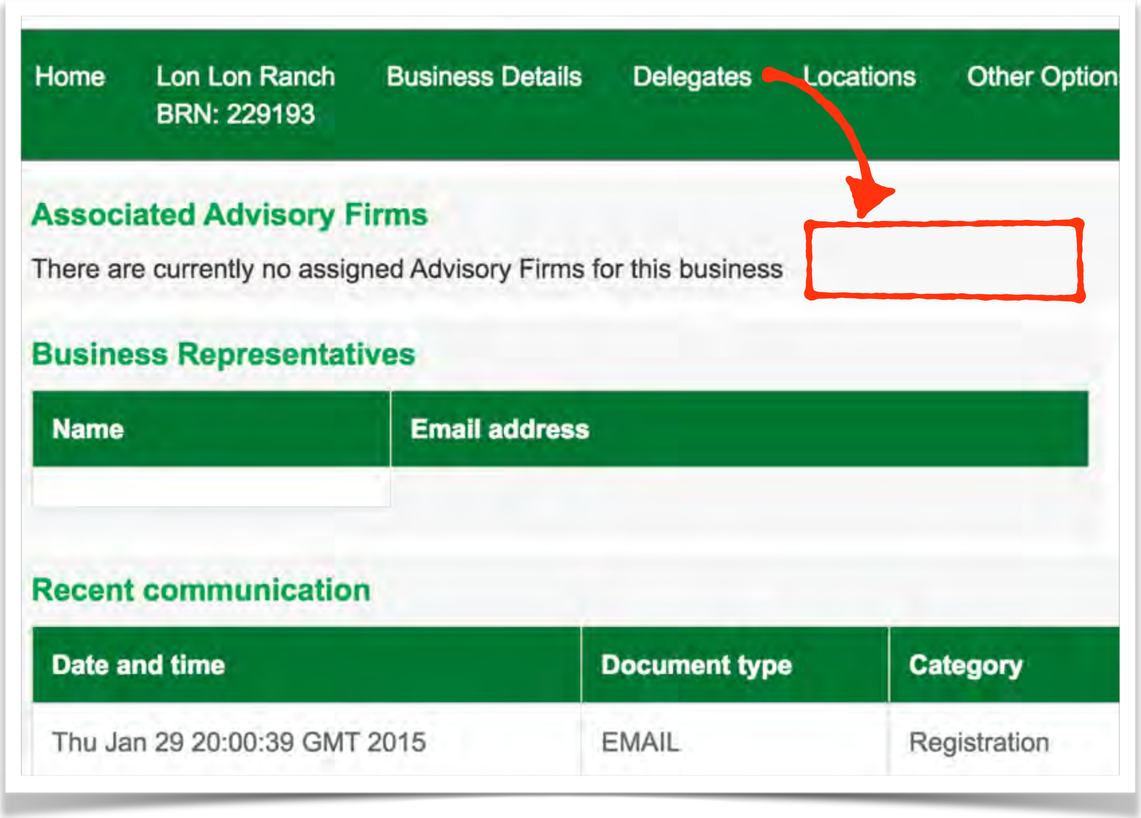
Suggestion: Setting an advisory firm CTA after setup

Participants have stated they are having difficulty setting up an advisory firm once registering their business

- Although the online service is meant to empower users in managing their own business, many are still interested in giving advisory firms access. They are running into issues with not knowing how to do so in the current system

Recommendation

- On the business details page, consider adding a “Link Business to Advisory Firm” button **-or-** help guide on how to give advisory firms access at this point
    - This will ensure users are aware there is an additional step they must take to complete the request on their end



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Locations & Mapping

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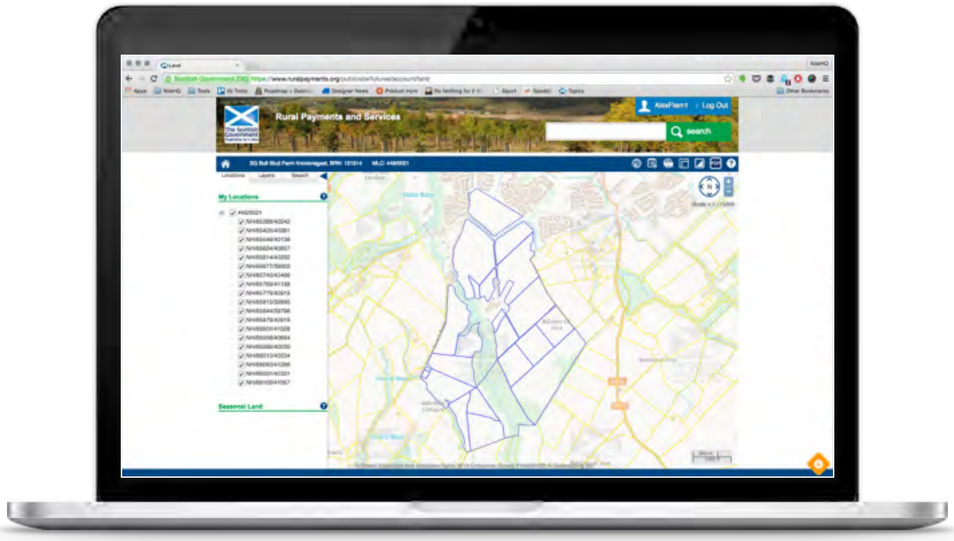
The mapping tool was an overwhelmingly positive addition

Positive - Both farmer and agent participants are very happy with the mapping tool.

Only minor suggestions were made to make this an even better experience in later iterations



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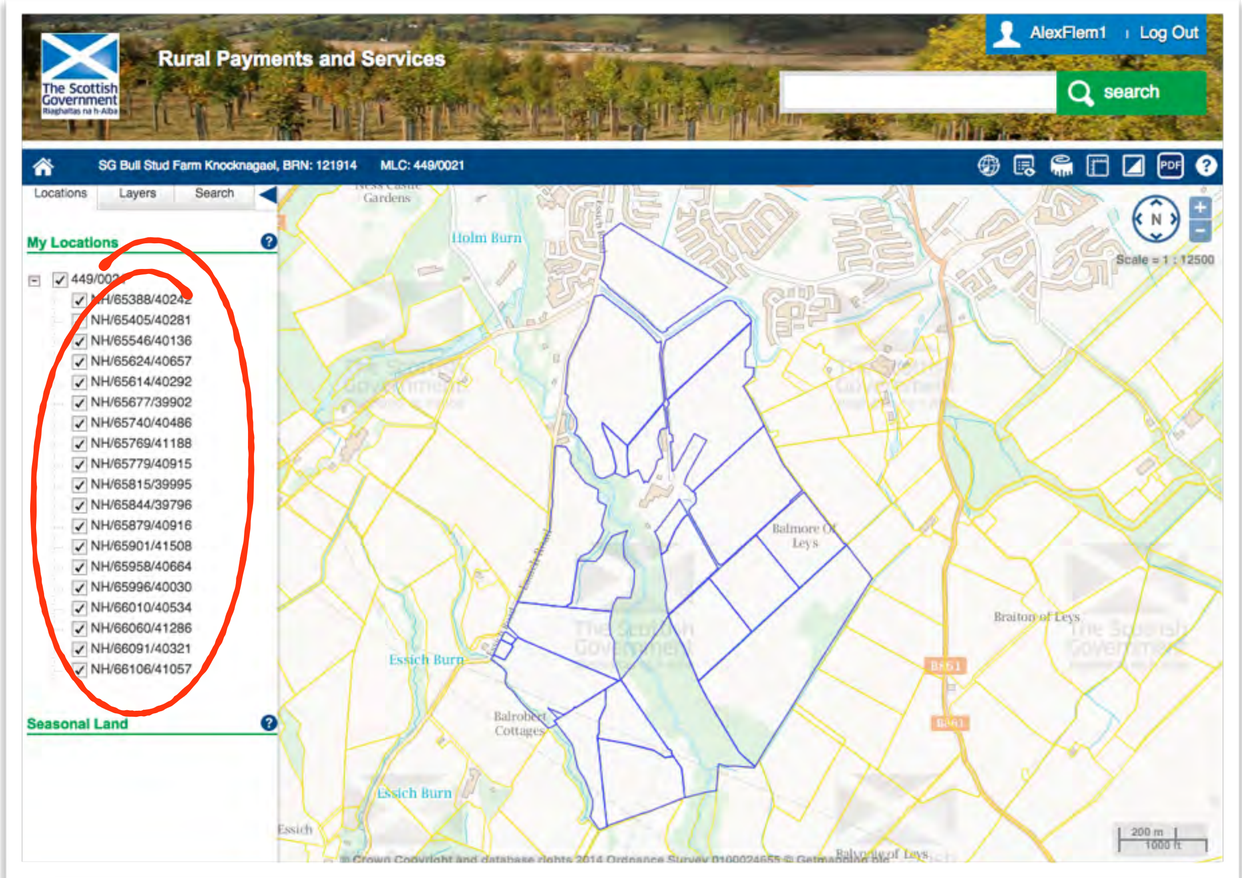
Participants wanted to see field chosen names instead of NH#'s

Participants know their fields by more personal names or go by issued maps that have a numeric order

- Both farmers and agents would rather see a reference name or field number before the NH#. They do not associate fields with these numbers on a regular basis.
- It is also difficult for users to remember NH#'s as they may have 20-100 fields.

Our recommendation

- Consider allowing a reference name to be used with the user ability to change/edit the name



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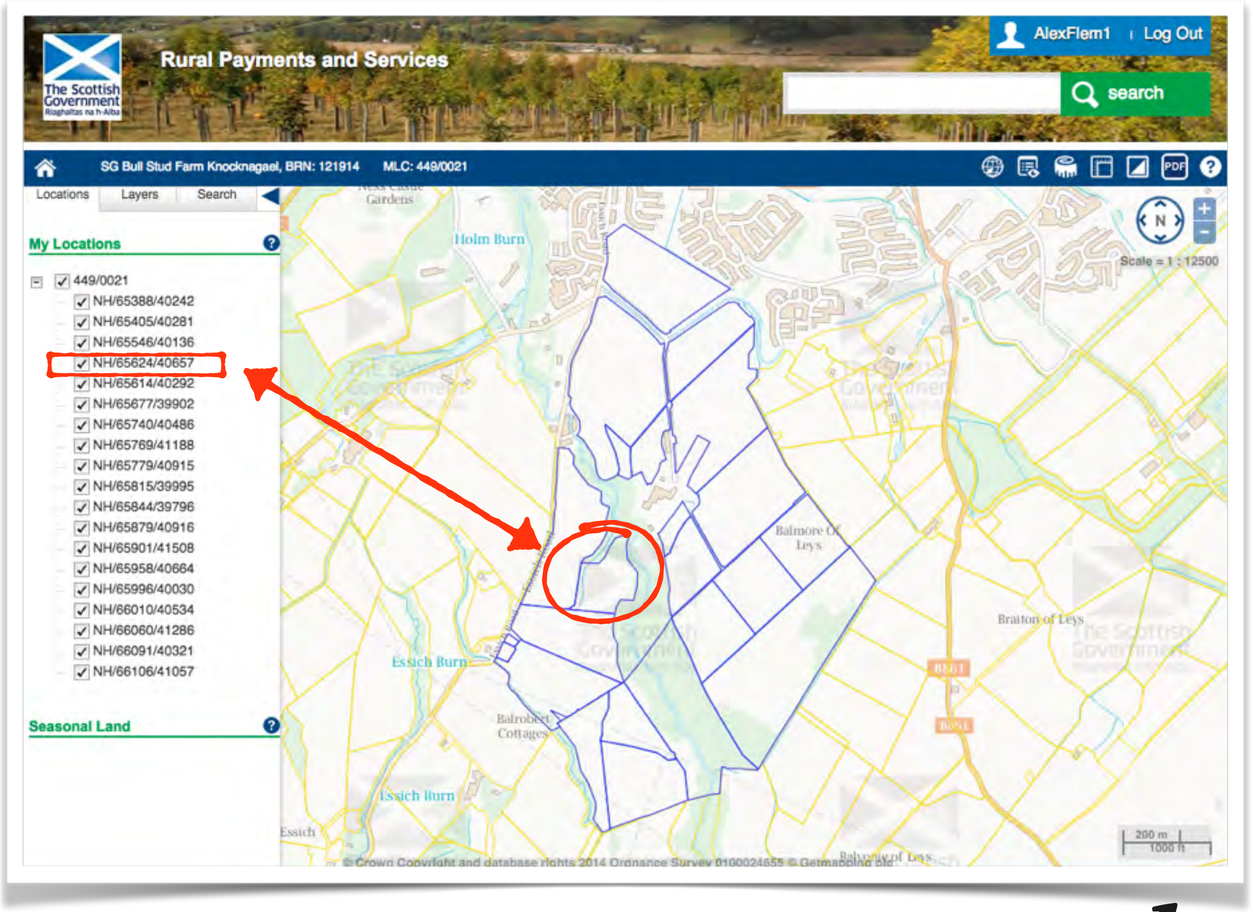
Suggestion: Better context with highlights

For some users it is difficult to see which reference number is associated to which field

- Some participants found it difficult to find the field that was selected/deselected when choosing a field.

Our recommendation

- Consider highlighting the field reference in the left hand panel as well as selecting/deselecting the field on the map



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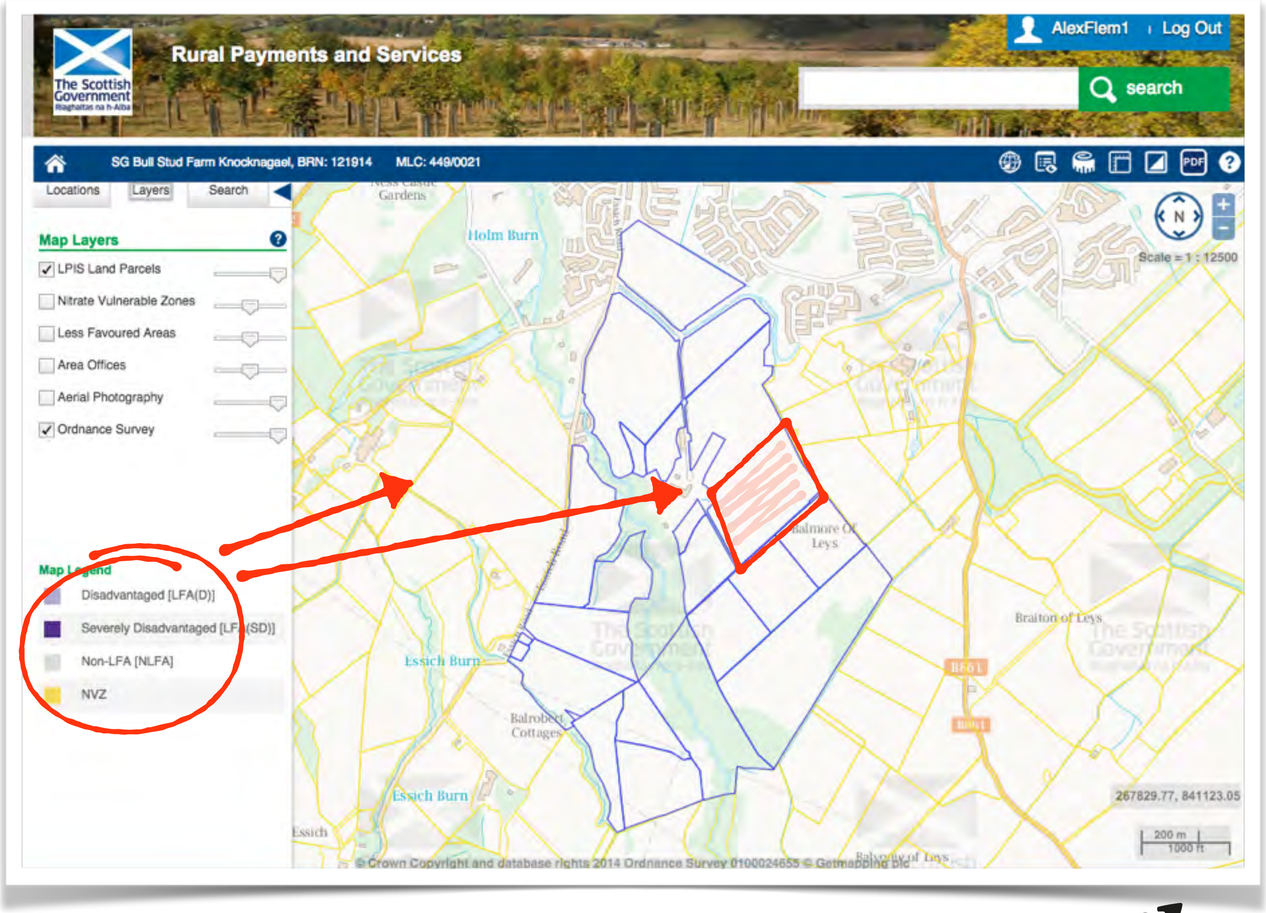
Layers could use more contrasting colours

Participants liked the idea of the map, yet some would like to see more contrast between layers

Our recommendation

- Making border lines **thicker** or adding a light opacity fill to the field boxes would provide greater visual clarity



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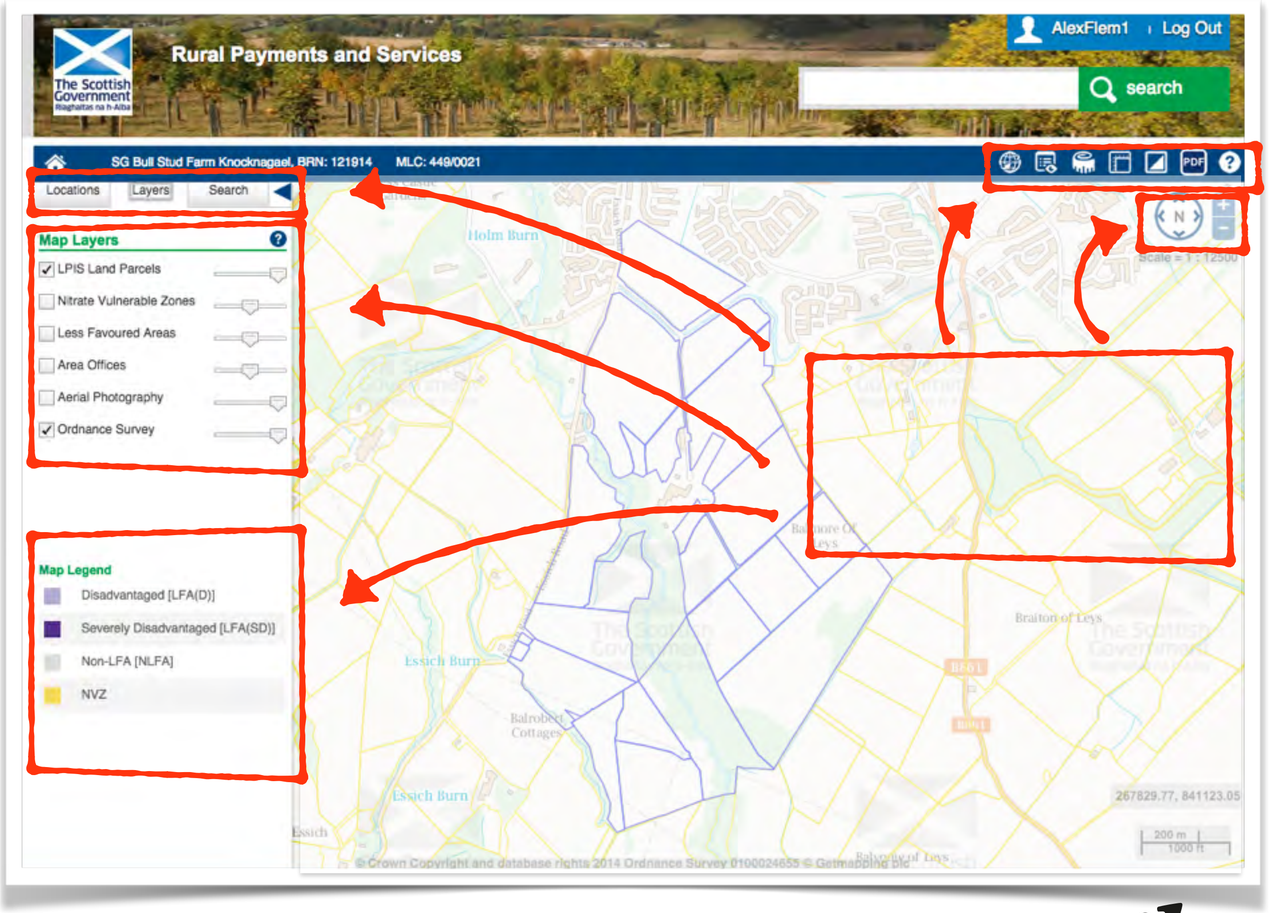
Users do not understand how mapping functions at first glance

Low - Participants love the map, but do not inherently know how to use it or the tools provided

- Some participants asked how to use features that were presented on screen. Some wanted to know where they could find help.
- The help PDF icon was not noticed by participants, and had to be shown to them.

Our recommendation

- Consider a small tutorial window pop up to highlight main tools and functions, as well as where the full PDF guide is available.



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Single Application Form Walkthroughs

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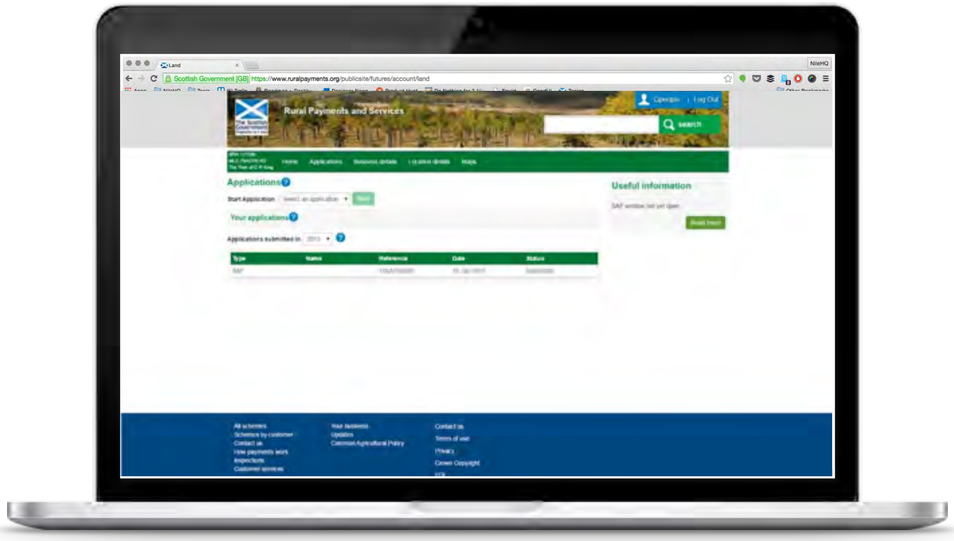
The SAF process is manageable, but takes a lot of user effort

Although all the content provided to submit a SAF is presented and broken down into steps, much deciphering is left up to the user

- **Understanding the application process -** Some participants are not clear on what details they should be using or what they are being asked to do in the process.
- **Understanding Functionality -** Users are being asked to understand functionality that does not follow a clear model, with little instruction on how to use it.
- **Language, acronyms/jargon -** Participants were mostly confused by the use of acronyms, business jargon, and lack of clear help text in appropriate areas.
- **Risk of errors -** Although this was not specifically called out during testing, farmer users are more likely to be overly cautious when submitting a SAF due to the risk in losing funding. This can be a mental burden during the application process and does impact the overall user experience.



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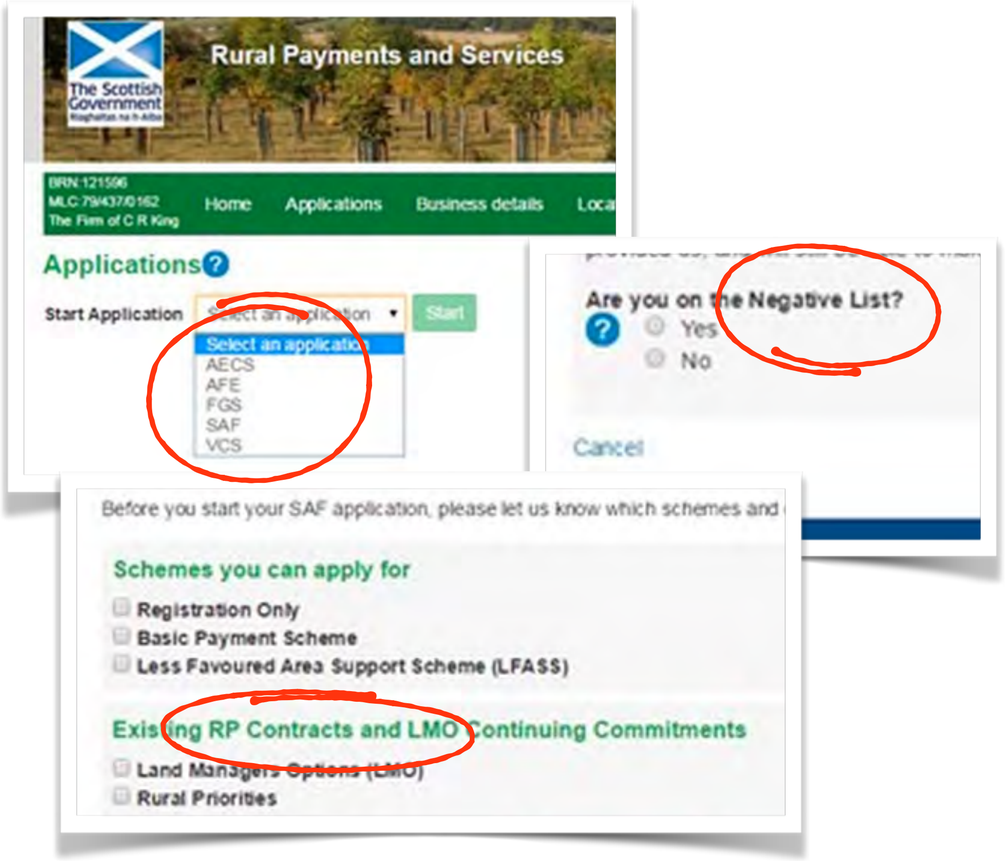
Users do not understand shorthand and jargon presented (1/2)

Medium - Participants are not accustomed to the acronyms and shorthand used within the department

- Many users will assume knowledge or guess as to what shorthand may be. In certain instances, users do not understand questions altogether. By using language this way, users are expected to work much harder when thinking about their application.

Our recommendations

- Spell out all acronyms, especially if it is the first time a title has been used.
    - In terms of starting an application, consider adding a short description to help users understand what each form is used for.



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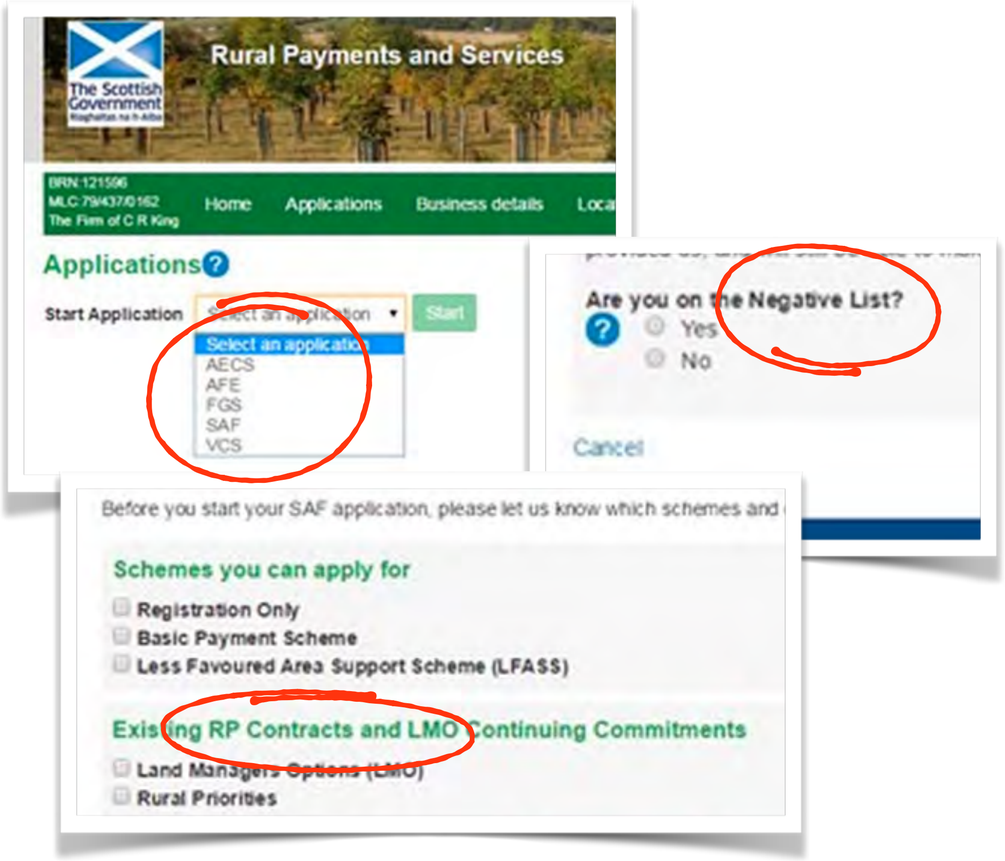
Users do not understand shorthand and jargon presented (2/2)

Our recommendations (continued)

- For any and all contracts, commitments, or special cases, add a help icon to allow users to understand what information they are being asked to decide on.



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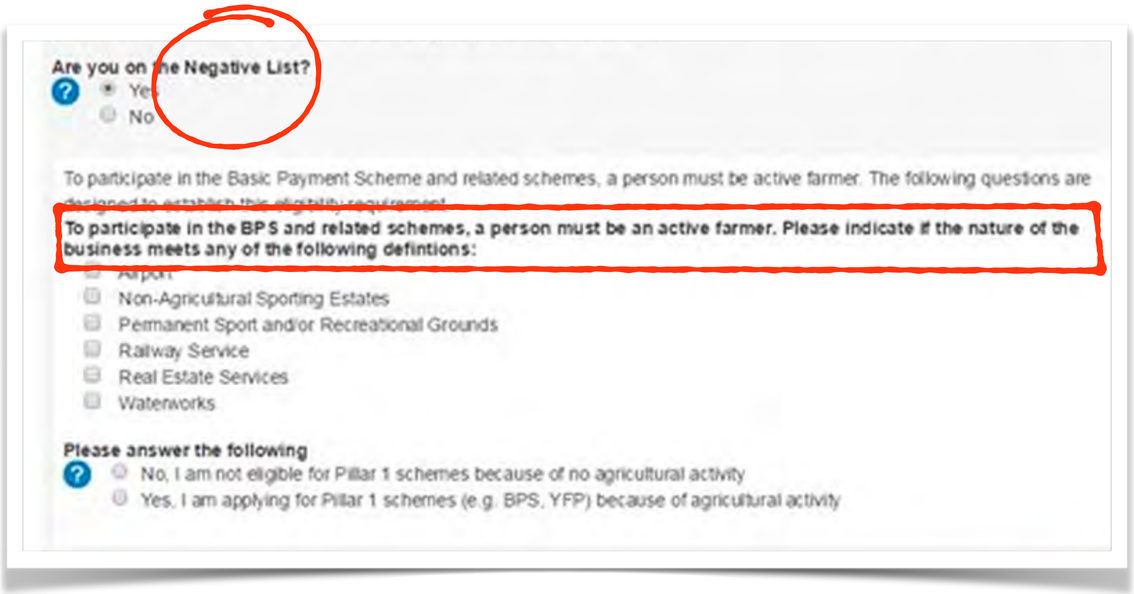
Participants are asked unclear questions about their holdings (1/2)

Medium - Participants are unsure about questions due to unfamiliarity

- The “Negative List” was consistently met with unfamiliar responses from participants.
    - Even though help text is present, the formatting of questions could be much clearer.



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Participants are asked unclear questions about their holdings (2/2)

Our recommendation

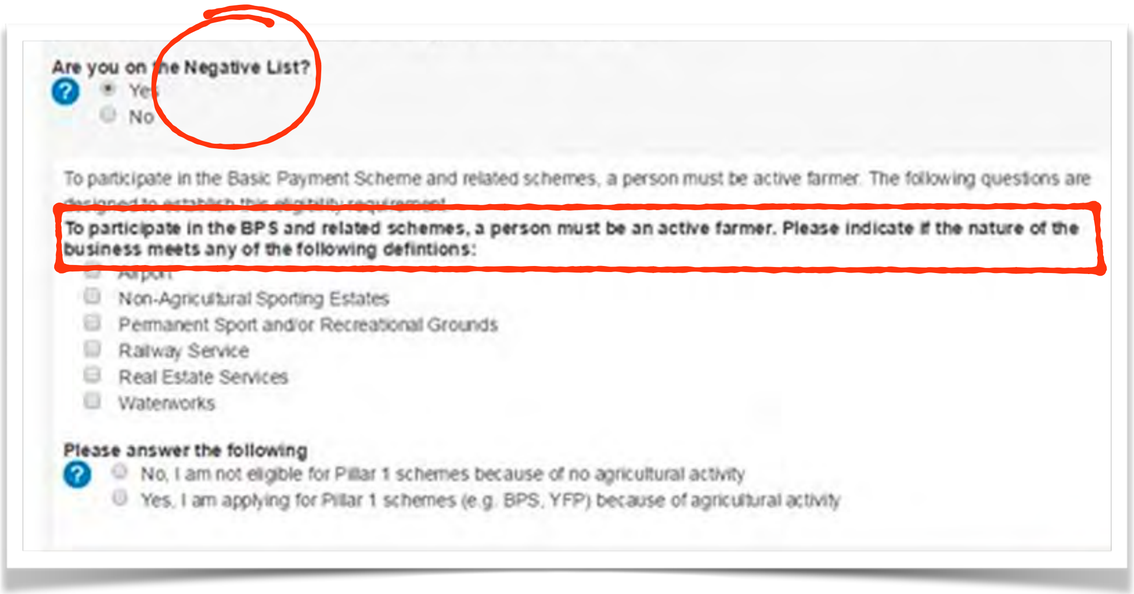
- Consider questions that prompt the user to answer easily, and explain circumstances if need be.

Example:

"Please indicate if your business meets any of the following criteria:

-Including a *"I do not meet any of these"* as an option

- If users select any of the following, they are told they are on the Negative List, and why this is important.



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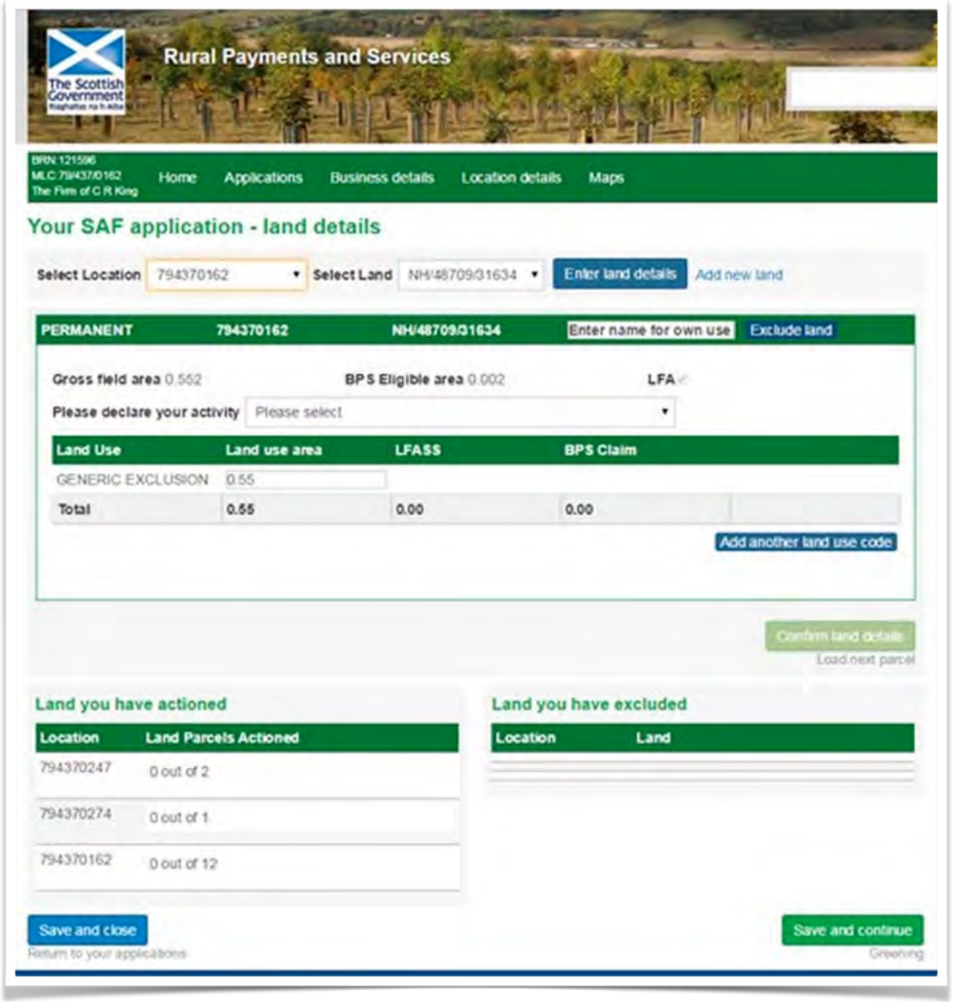
The land activities section is very unfamiliar to users (1/4)

Medium - Participants do not have a clear understanding of what they are meant to be doing at this stage

- **Understanding the application process -** Due to the current format and support, users come to this section of the application not knowing what they are meant to be doing. This page must explain what users are seeing.
- **Understanding Functionality -** The current layout and lack of instruction gives no starting point for what users are meant to be doing on this screen.
- **Order of operations -** Arriving on the Land Activities section throws users directly into the process without first giving them a high level view of what they are seeing.



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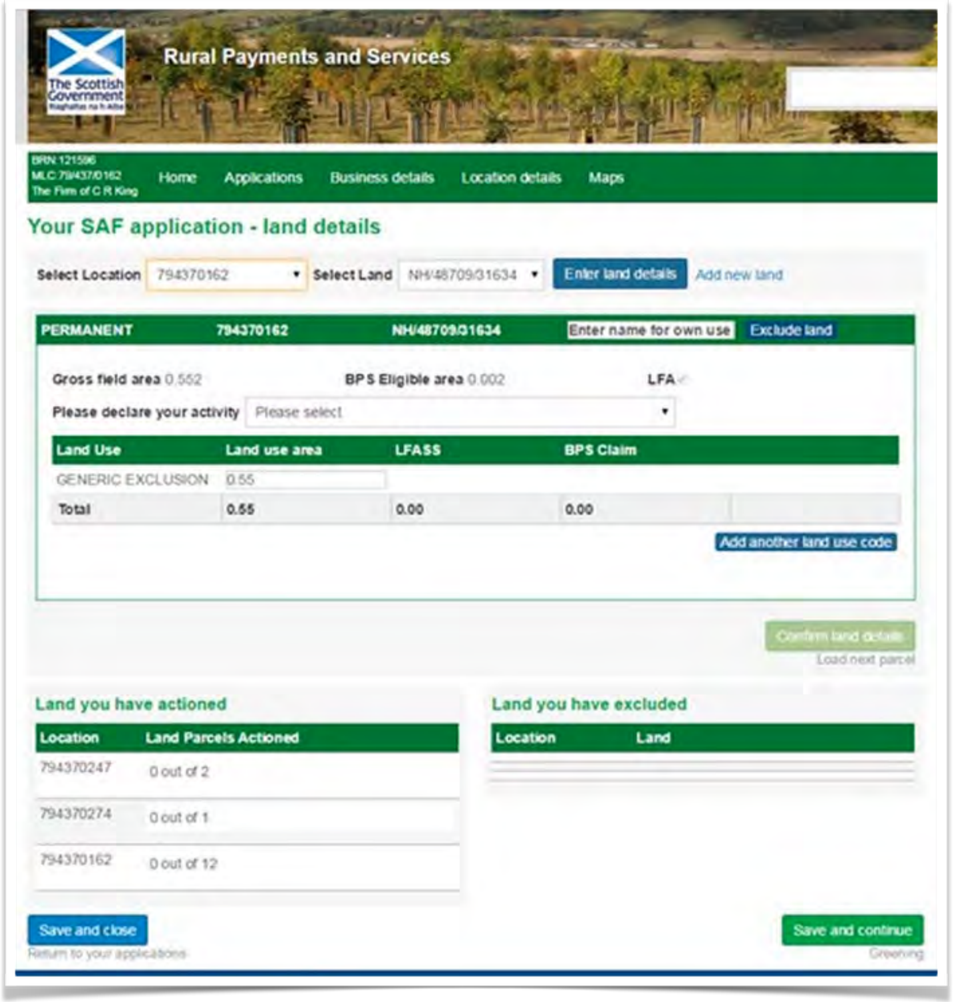
The land activities section is very unfamiliar to users (2/4)

Medium - Participants do not have a clear understanding of what they are meant to be doing at this stage

- **Validation -** After understanding what users are seeing, meant to be doing, and how to accomplish the task, a form of validation will help users understand when they have correctly confirmed details.



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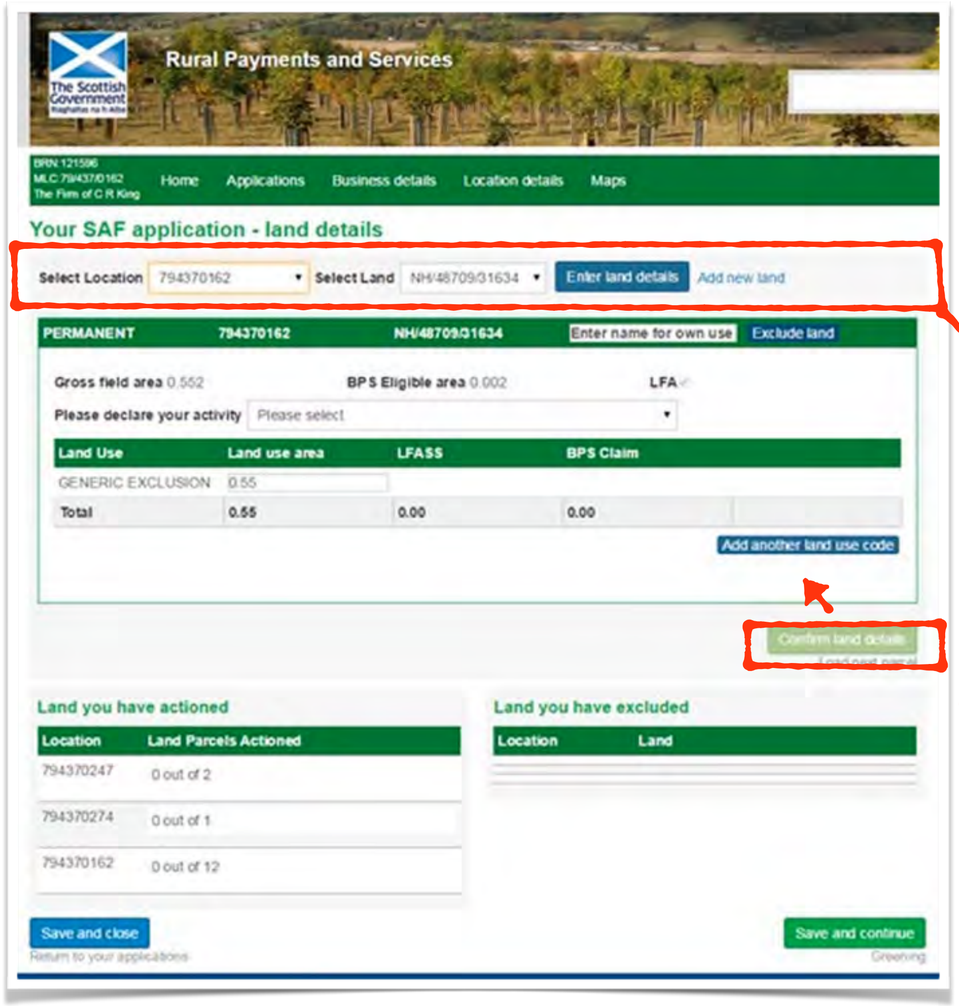
The land activities section is very unfamiliar to users (3/4)

Our recommendations

- **Understanding the application process -** Consider a summary of this section under the section title to explain what is required at this stage in the application.
- **Understanding Functionality -** Rearranging content may give users a better understanding of where to start, and how they can easily move through data



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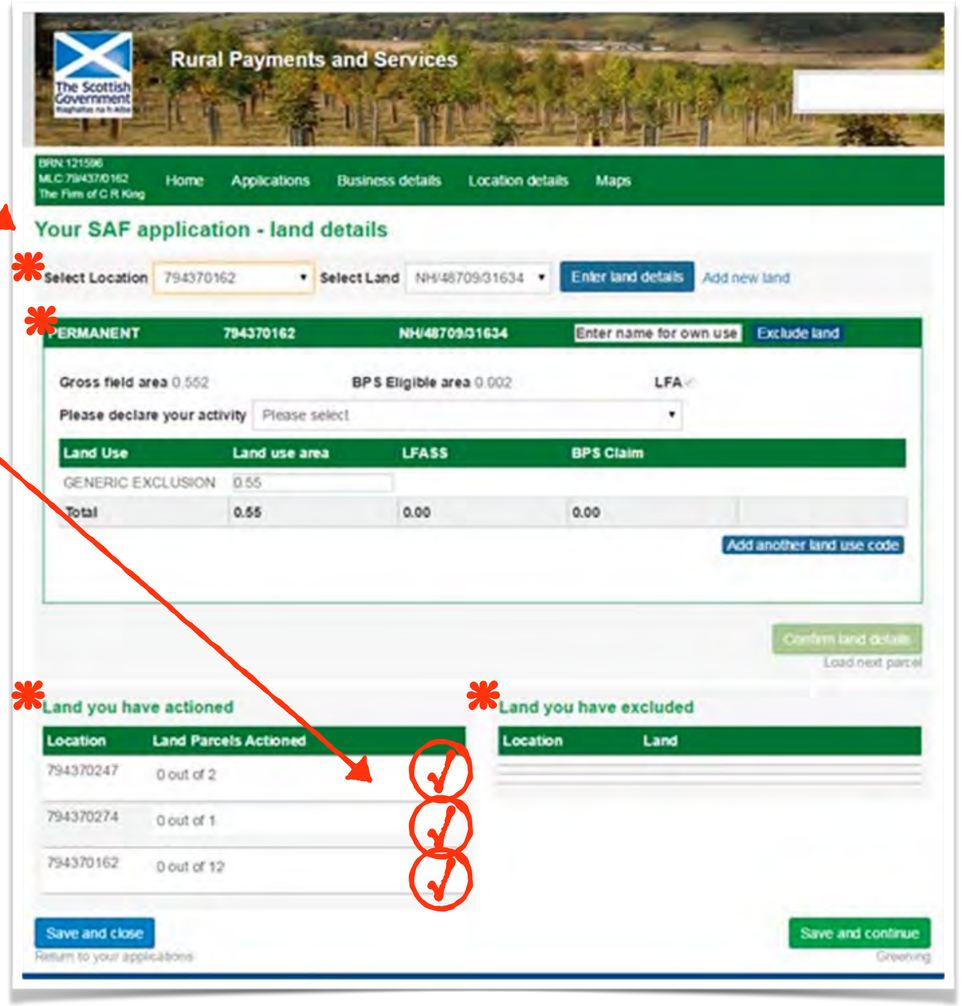
The land activities section is very unfamiliar to users (4/4)

Our recommendations (continued)

- **Order of operations -** Label panels to boost importance with visual hierarchy and simply explain what they are used for
- **Validation -** Along with adding land to the actioned panel below, consider highlighting parcels within a list that have been actioned vs. those that have not been actioned.
    - Alternatively lead users down every parcel and kickback an error if one is missed, but showing a visual validation will save user confusion.



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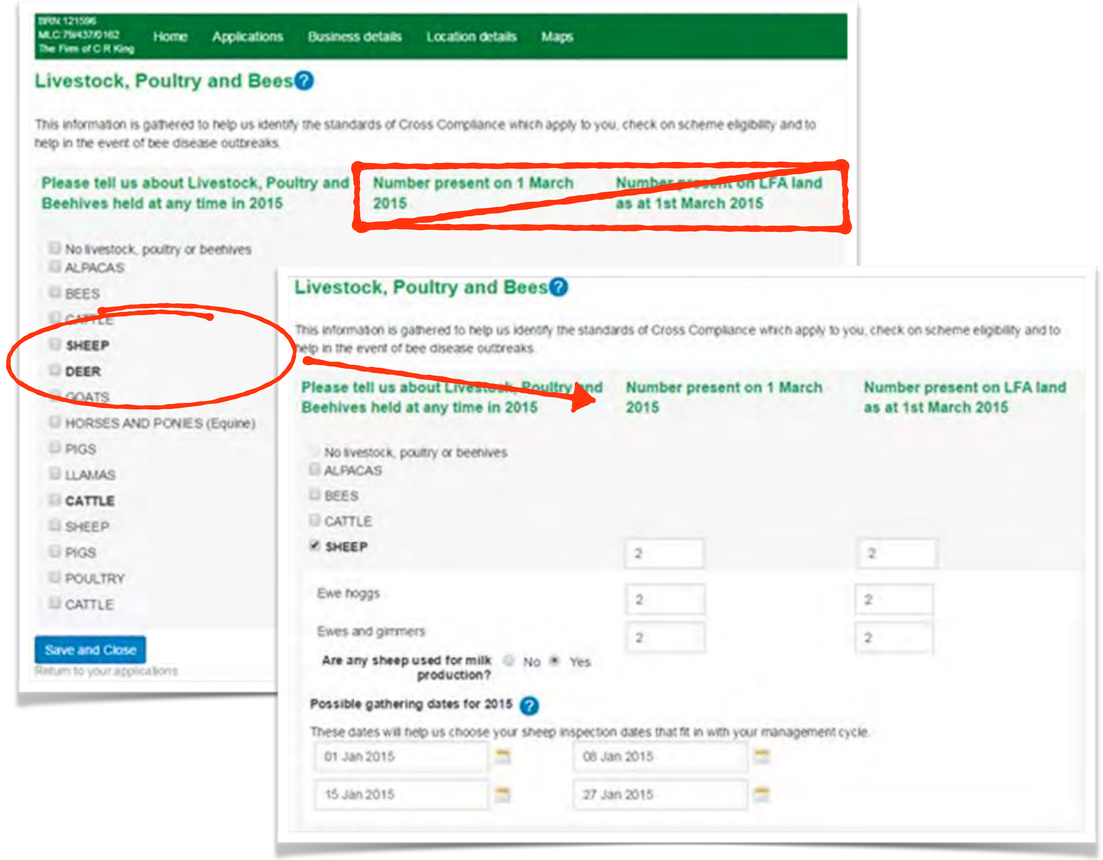
Livestock, poultry, & bees columns unclear until after click

Low - Participants were unsure about what the two right hand columns did before choosing from the first

- Although this section is straightforward enough, any chance to remove confusion is helpful

Our recommendation

- Consider removing the column title until after a selection has been made



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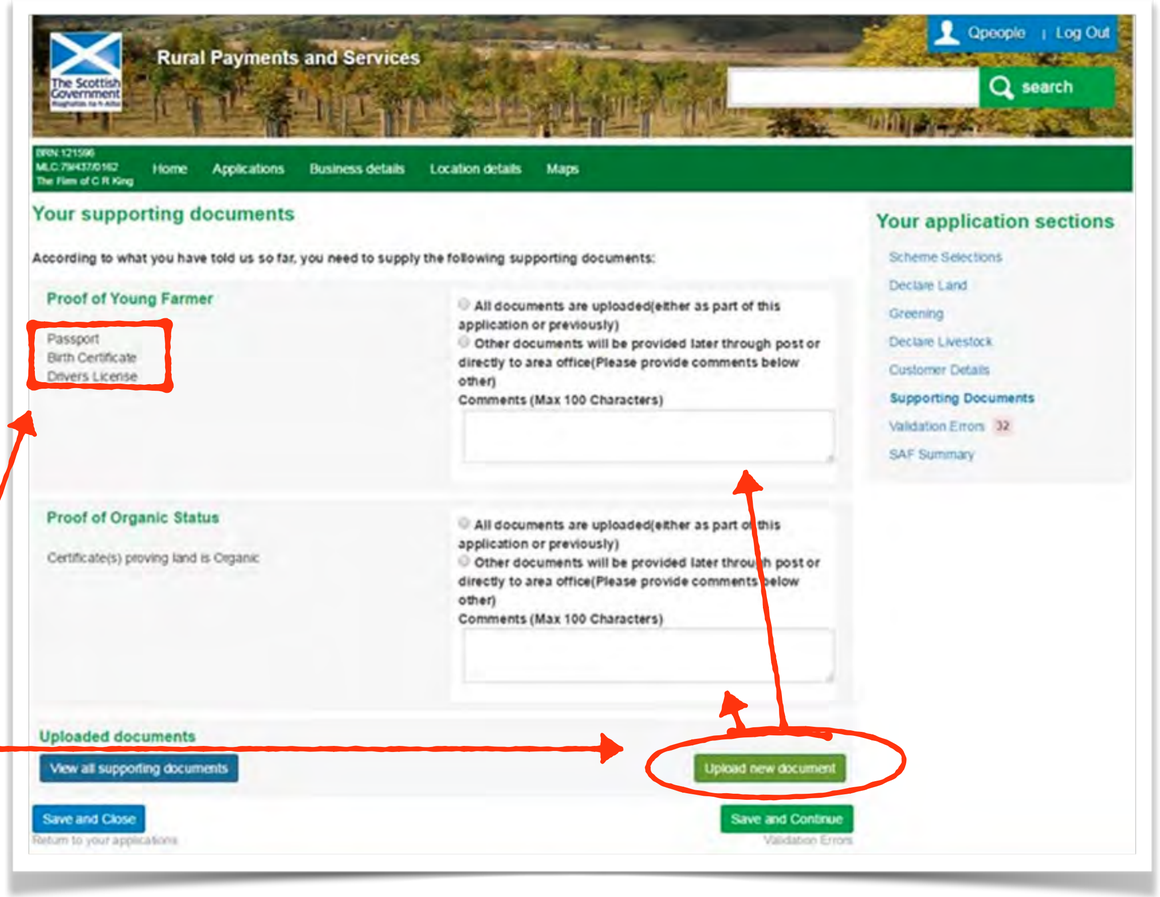
Users had difficulty understanding how to upload documents

Low - Participants questioned how they would upload documents and which were required

- The placement of the upload documents button created a disconnect for participants looking to find it in each section.
- Users questioned whether all documents were needed as there is no guideline to explain if all, one, or a combination are required

Our recommendation

- Signify all/one of the documents listed are needed for verification
- Move the Upload documents button into each of the corresponding panels to visually clarify which documents go to which requests.



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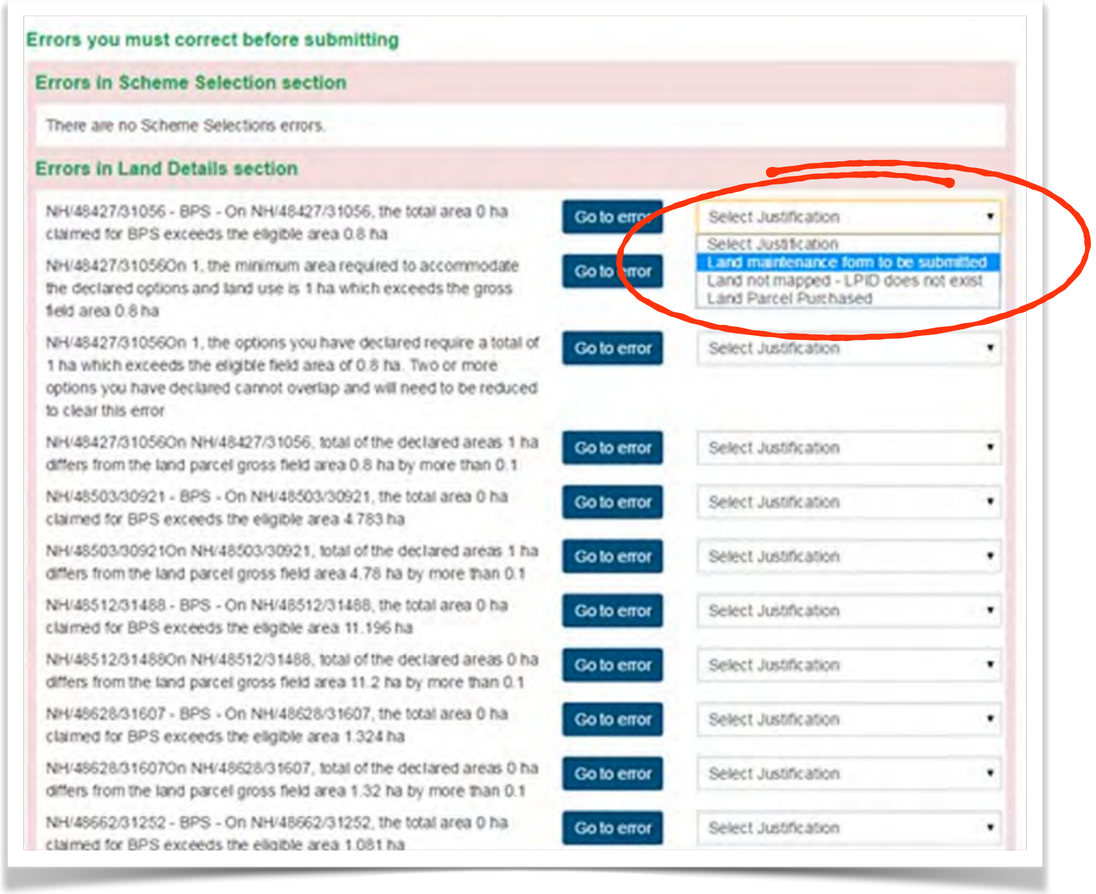
Users have no context to error correction

Low - Participants found error messaging somewhat overwhelming, but would look for ways to understand what to action

- Some users did not have a good understanding of what Justifications were meant to do

Our recommendation

- Provide a title to clarify why users are filling in a Justification on the error page



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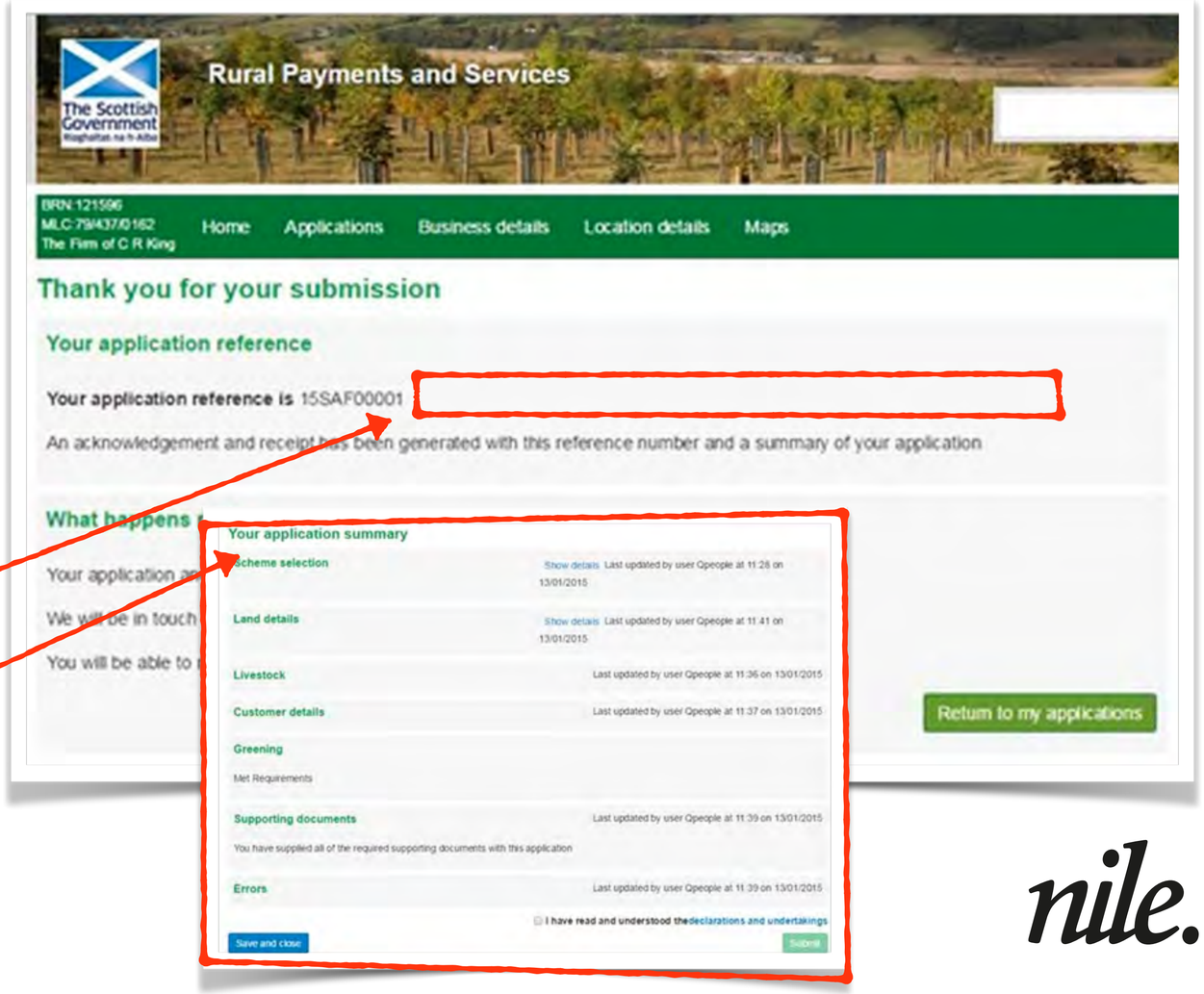
Participants wanted to action their submission once complete

Low - Once the submission had been completed, users looked to verify the application, and want to complete an action

- Some participants requested the ability to print/download a PDF summary
- Some participants simply wanted to see an overview of their submission

Our recommendation

- Consider stating that an overview of all application submissions are present on the following page
- Allow users to download PDF summaries from the application overview



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Conclusions & Next Steps

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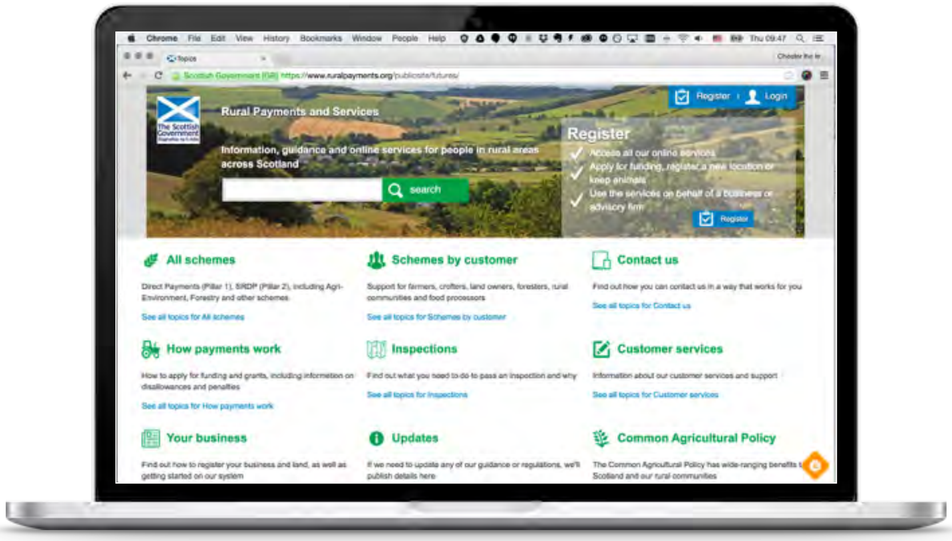
In summary

Assuring functionality on all browser types is top priority

- The minor issues with clarity and flow that have been called out in this report can be easily fixed, and should not require difficult programming to complete
  - Users are generally happy with the site but wanted a bit more clarity around steps and processes
  - Users are making important claims at the stage of filing applications and should be guided as much as possible to feel assured.



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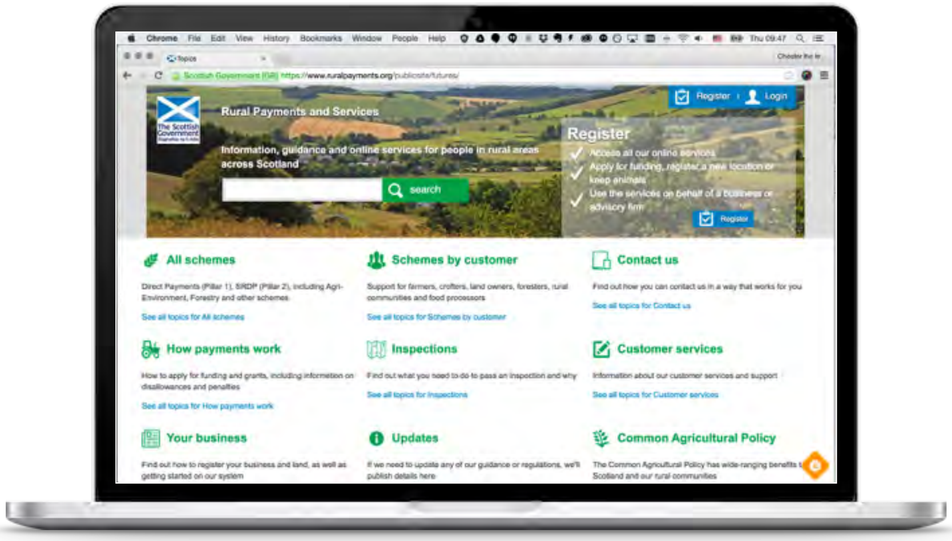
In summary

Although most issues are of lower risk, many smaller issues accumulate confusion for users

All the content provided to submit a SAF is presented and broken down into simple stages, yet much deciphering is left up to the user

Users are overall happy to use the site and are excited about mapping and its possibilities



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Next Steps

Nile have worked with the Futures Programme team and see potential in looking at the overall customer experience as well as how we can support with future implementations to the portal

- Although no formal next steps have been discussed, the Nile team see the Rural Payments site having much potential to address the needs of its customers

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Next Steps

- Although no formal next round of usability testing has been confirmed, Nile are happy to discuss any of the findings in this report.
- As the Scottish Government prepare for the next build of the Rural Payments website, we are happy to provide support to insure knowledge from previous rounds of usability are understood by all team members.
- It is also worth considering other usability methods Nile are accustomed to for gaining similar insight with varying amounts of time allotted, participants available, or fidelity of further concepts.
- For more information, contact the consultant who has worked on this project. Details are on the following page.

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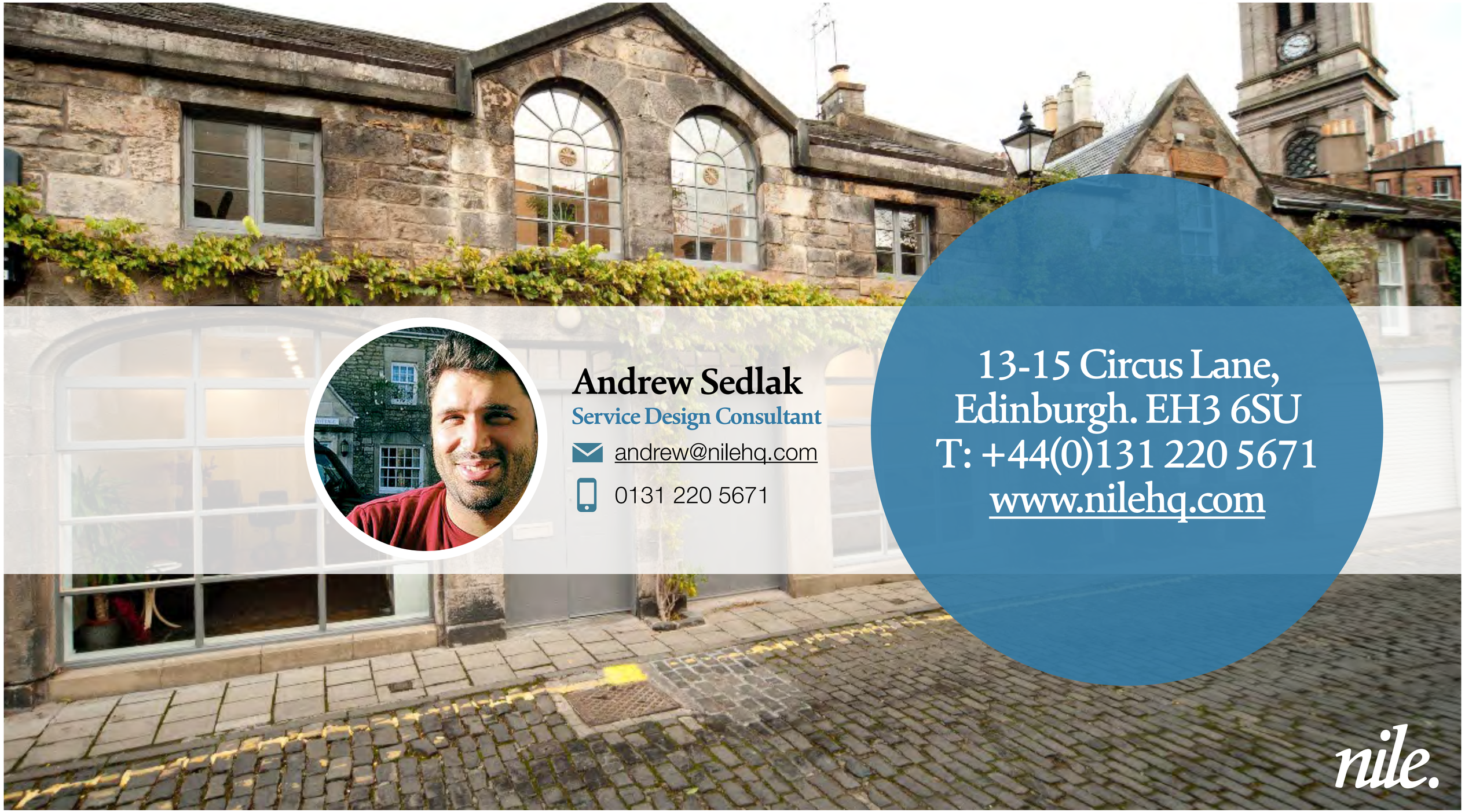

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