

Microsoft
PERFORMANCE REVIEW
STANDARD REVIEW FORM
AUGUST 1999

Please complete all four parts of this Review form:

1. Performance Review and Planning
2. Competency and Career Development
3. General Comments
4. Overall Rating and Signatures

A minimum of two one-on-one feedback sessions during the next Review period is recommended.

Name Wendelin Dunlap
Email Name WendelG
Title User Interface Program Manager
Employee ID# 42523

Reviewer Thomas Carey
Dept. Name BEDUA
Date 08/01/99

PART I. PERFORMANCE REVIEW AND PLANNING

A. Evaluate Performance Against Objectives

- List each performance objective in priority order.
- Beneath each performance objective summarize and rate results for this Review period.
- Discuss specific reasons for the level of performance achieved on each objective, for example:
 - Personal factors (e.g., level of effort demonstrated, level of knowledge or skill demonstrated) that helped or hindered performance
 - Situational factors (e.g., resources, people, events) that helped or hindered performance
- Give constructive suggestions for how performance could be improved.

EMPLOYEE'S EVALUATION AND RATING:

Task Based Accomplishments

1. Accomplishment: Integrate multimedia tutorials where they can add value throughout the product.

A. Focus: Find a complex area of the ResKit, Win 2k Web Deliverable, or Janus and work with the PM to design, develop, and implement the multimedia UI.

Quality/Quantity: Success will be determined by the amount of customer delight when using the multimedia UI as captured by usability tests.

Time: ResKit/Win2k Web Deliverable/Janus time frame

Summary:

I designed a 50-second, user controlled tutorial used text, graphics, speech, and motion. The tutorial describes the Boolean search functionality in HTML Help. I really blew the doors off this one. Customer delight was through the roof. In usability, customers could not contain themselves. They exclaimed "Now, that is way cool" and "Oh, I really like that".

Best of all, users learned from the tutorial and were still able to describe how the different Boolean operators scoped their search after two distracter tasks and not when viewing the tutorial. Most participants began using Boolean operators without being instructed to after seeing the tutorial. Using Boolean operators makes the HTML Help search engine return better scoped results which can reduce complaint of too many results returned.

It would be useful to incorporate these types of tutorials for other complex areas. I am not suggesting using them in a product overview, instead using them at the point of contact. Other great places would be in troubleshooters or as part of the ResKit.

REVIEWER'S EVALUATION:

Wendelin this is a task you truly excelled at. You had to use technologies that were completely new to the BEDUA group and you managed to master them in excellent fettle. You also worked in excellent collaboration with the BEDUA design team. You did an excellent job of working with the Usability group to incorporate their input into your final deliverable. I truly wish there were some

way to attach the users response to this review. Their enthusiasm was extraordinary.

Equally as important as the implementation work you did was the effort you put into ensuring that whatever you delivered would meet the stringent Windows 2000 coding standards and addressing all the BEDUA Localization issues.

All in all I can not image a project being run better than this one.

2. Accomplishment: Incrementally improves Windows 2000 Help Deliverables.

A. Focus: Work with the Win 2k Web Deliverable and Windows.com teams to develop a web version of Help that will offer the user a better UI than the current HTML Help based web solution.

Quality/Quantity: comparative usability tests and/or customer survey will determine Success.

Time: Win2k time frame.

Summary:

When the project started, BEDUA owned the user interface and was developing a solution to be posted on WindowsUpdate.com. Having attended many HTML Help usability tests, I developed a list of improvements. I then worked to incorporate them into the new user interface. My main goal was to build a design that is the least cognitively challenging and supports users who browse for information. Other improvements I outlined were to:

- Have a single entry box for accessing the index and search.
- Allow users to view search and index results at the same time.
- Use a search engine capable of Natural Language Query so that users could expand their vocabulary by seeing the names we had given to our features while using their natural terms.
- Allowing for result boxes that expand to fit the results without the need for horizontal scrolling.

I wanted to get away from the myopic, linear model that HTML Help uses where the user has to choose between the TOC, Index, and Search, then navigate to find the topic. If the topic is not found they have to choose a different section. They can never type in a word and see everything we have pertaining to the topic.

I worked with Fred Wurden Infotech (the new technology for viewing large sets of documentation over the web), Robert Strumberger from Truffle (an enhanced natural language which is already being used in Encarta) to include the natural language element. I then combined the remaining improvements into a single UI. I knew that I needed to evaluate the effectiveness of my changes by testing users on this new UI. The usability department was unable to schedule a test in the time frame that I needed. Since my background is in usability, I borrowed the portable usability lab from Kris Durgin. I then set up the lab, recruited ms employees from other groups and a number of receptionists. I wrote the task list and ran 7 subjects through using the prototype. It took me only 10 days to recruit the subjects, design the test, run the subjects, and compile the results. I changed the design based on the usability results then set up for a second round of usability tests with John Pruitt and Leslie Scott from Windows User Experience Usability. This test compared the existing HTML Help based NT 5.0 model to the new Web Deliverable design. It was found that:

- The checkboxes in the Web Deliverable Prototype are easily discovered and more likely to be used than the Index link/button in the Existing NT 5.0 Model, which was not discoverable.
- Users like the presence of multiple result boxes and the ability to choose which boxes appear during an informational search.
- Users are better able to use the Web Deliverable Prototype without assistance.

Shortly after these tests, the decision was made to move to Windows.com. One major change is that their designers would own the UI and Windows.com would do all of the development work. Windows.com designers chose to go with an HTML Help look and feel, which would:

- Include the Hide/Show button (which has repeatedly been a problem in usability).
- Have the need for horizontal scrolling, which wastes user's time.
- Require separate entry boxes for Search and Index, which also wastes user's time.

- Not support natural language query.

My current role is to make suggestions to the Windows.com team about how their UI could be improved. I have made many suggestions about the shortcomings of the UI and wait with anticipation to see if they will incorporate any of my suggestions. This role should continue until RTM. Since the new UI has many of the same flaws as HTML Help, it will be difficult to achieve my goal of having an improved UI when compared to HTML Help. I will carry through with my attempt to improve the UI by continuing to make suggestions, and continuing to suggest that like I, they work with Susan Dumas of MS research to improve the display of their search results. Also, I will supply their designers with copies of HTML Help usability tests in hopes that, like I, they will be able to educate themselves about the shortcomings of the UI model that they are using.

B. Focus: Investigate new technologies for searching our documentation set. Work with writers to write content so that it is optimized for the new Search engines.

Quality/Quantity: Success will be determined by the amount of improvement in performance of the Search engine on our content. This can be determined by comparative tests performed by other groups.

Time: Win2k/Janus time frame.

Summary:

I brought together many groups at MS in order to explore the best in Search technology. I worked with Fred Wurden Infotech (the new technology for viewing large sets of documentation over the web), Robert Strumberger from Truffle (an enhanced natural language which is already being used in Encarta), Emily Waren from Windows.com and Lola Jacobsen from BEDUA to investigate the feasibility of using Infotech/Truffle on our Web Deliverable site. I also worked with Mary Czerwinski and Susan Dumas from Microsoft Research to determine how our results could be displayed so that they are most useful to our users. Additionally, I worked with writers to add Meta tags so that our documentation is optimized for the new Search engines.

I was able to bring the Infotech and Windows.com groups together to discuss requirements. Much testing was done, but in the end, Infotech was not capable of achieving the performance level that Windows.com requires.

REVIEWER'S EVALUATION:

To say that the windows.com piece has been a challenging project would be an understatement of the first water. Wendelin, your concerns are discussed extensively in this review and I shall not go into those here.

What needs to be evaluated is the work you did early in this project with the InfoTech team as well as the transition to the windows.com team.

The approach you took early on in the project was creative and innovative. You were searching for solutions to some very complex problems. One of the more impressive things you did was to get involved with the Microsoft Research team to gather input and then try and convert that input into a practical application. The fact that these ideas did not come to fruition was a function of the changing climate of our delivery mechanism and did not directly reflect on your work.

One of the key things that you should learn from the experiences that you have had with the windows.com group is that there is only one chance for making a first impression. In the case of BEDUA's interaction with the Windows.com team the first impression was disastrous and that will never go away.

3. Accomplishment: Evaluate the effectiveness of Windows 2000 Help Deliverables.

Focus: Work as the User Advocate on the BED UA Polaris Futures Planning team to develop methods for determining the success of various Bed UA deliverables.

Quality/Quantity: Success will be determined by the quality of the written report evaluating customer satisfaction.

Time: Win2k Beta 3- RTM time frame.

Summary:

After examining methods of reaching out to our users, I decided that posting a questionnaire to the newsgroups would collect the most data for the money. I worked with Frank Chidsey (PSS), Karen Carncross (BEDUA) and Debbie Frederickson (BEDUA) to post a questionnaire in the Help newsgroup. Also met with John Gray (BED Release Management) and Todd Hafer (BED Release Management) to see what resources they had to poll users. They directed us back to Frank Chidsey (PSS).

I have collected data from a growing number of users and will be able to write a very insightful written report by RTM. Going forward, I will work to post questionnaires to newsgroups other than Help in an attempt to reach more users. I have not written the report yet because most of the responses have been from beta testers. Beta testers tend to be high-end users. I want to wait to get input from other medium to lower-end users to make this report as broad reaching as possible.

REVIEWER'S EVALUATION AND RATING:

This is an interesting project that you need to continue to drive. The data you gather from this will be instrumental in moving BEDUA to an improved deliverable. Wendelin this is another project that demonstrates your ability to create alliances with the right people to help you accomplish your tasks. You need to work with the Janus team to see what incremental changes can be done to the UA content to improve the user experience.

4. Accomplishment: Research Help systems for future releases of Windows.

A. Focus: Work as the User Advocate on the BED UA Polaris Futures Planning assess user needs for future versions of Server/Enterprise Help.

Quality/Quantity: Success will be determined by completeness of the written assessment of user's needs.

Time: Saturn/Neptune time frame.

Summary:

I am working with Amy Kerr to develop user scenarios as the basis for our user research. Once we have defined the users, we will work to collect more information about their needs for information. We are also working with Kris Durgin (BED Usability) and Robert Corrington (BED Dist Sys & Svr Dev), and Rod Fergusson (US-ES Services Asset Deve) to follow their research of customer scenarios and segments. I am well on my way to assessing user needs for future versions of Server/Enterprise Help. In the future, I will continue to gather information for the user scenarios and needs assessment. Also, I will continue to find others in Microsoft to review the user profiles and give input about refining the list.

B. Focus: Work as the User Advocate on the BED UA Polaris Futures planning team to analyze competitor's Help products.

Quality/Quantity: Success will be determined by completeness of the written analysis of competitor's products.

Time: Saturn/Neptune time frame.

Summary:

I have not done much work towards this yet since it depends on developing our user scenarios. Once I have defined our users and what their jobs are, then I can identify the software and resources they are using and begin the competitive analysis.

REVIEWER'S EVALUATION AND RATING:

Wendelin this is where you skills and talent will have a chance to really shine through. Beyond your design skills is your ability to create useful contacts and your ability to turn your ideas into deliverables.

The last twelve months have been consumed with Windows 2000 work. Now is the time to really focus on this task. This is pivotal to BEDUA.

5. Accomplishment: Prototype Help systems for future releases of Windows.

A. Focus: Work as the User Advocate on the BED UA Polaris Futures Planning evaluate to make interactive prototypes based on the user needs assessment and competitive analyses I complete.

Quality/Quantity: Success will be determined by completeness of the idea and the prototype.

Time: Saturn/Neptune time frame.

Summary:

I have not begun to prototype yet since it depends on developing our user scenarios. Once I have defined our users and what their needs for information are, then I can begin prototyping new ways to fill their needs.

REVIEWER'S EVALUATION:

General

Wendelin, you have been remarkably effective for the short time you have been a Microsoft full time employee. You have aggressively sought out resources well beyond your immediate peers. This is something that many people never do or at the very least take a considerably longer time to initiate. You have sought out resources from the mundane to the arcane to help you get your tasked accomplished. This is one of the key ingredients to having a successful career at Microsoft.

Personal Growth Accomplishments

1. **Accomplishment:** Begin this study: Compare real world navigation to computer way finding.

Focus: How is real world navigation similar to computer way finding?

Quality/Quantity: Success will be determined by the quality of the paper I write after testing the subjects.

Time: Develop an outline for the research and testing by June 30th, 1999. Write a technical paper, which disproves my hypothesis by December 1st, 1999.

Summary:

I wrote an outline for the research and testing and met with Mary Czerwinski (MS Research with a spatial cognition focus). She gave me a list of books to read on the topic of real world navigation. It appears that the December 1st, 1999 deadline for completion of the technical paper was a bit optimistic. I will readjust my goal to have an annotated literature review by December 1st, 1999 and finish the study by June 30th 2000. Mary is very interested in my work and has agreed to be my mentor and assist me with getting the necessary resources for user testing.

REVIEWER'S EVALUATION AND RATING:

These are the type of goals that often get pushed back to the point that they never see the light of day. The work you have done so far has indicated that you will not let this happen. Wendelin I can not stress enough how important these type of goals are. Do not let this slip away.

B. Identify Performance Plan for Next Review Period

- List 5-7 specific, measurable performance objectives in priority order for the next Review period
- Identify keys to success for achieving each objective, for example:
- Resources, tools, or other kinds of support
- Training or development needs

- Performance objectives should be mutually agreed upon by employee and manager
- If you are a manager, objectives should cover your contribution to your group or organization, as well as your individual contribution
- If you are a senior manager, include steps you are taking to understand and value diversity in your organization

EMPLOYEE'S PLAN:

Task Based Accomplishments

1. Accomplishment: Evaluate the effectiveness of Windows 2000 Help Deliverables.

Focus: Work as the User Advocate on the WOS UA Deliverables Planning team to develop methods for determining the success of various WOS UA deliverables.

Quality/Quantity: Success will be determined by the quality of the written report evaluating customer satisfaction.

Time: Win2k Beta 3- RTM time frame.

2. Accomplishment: Incrementally improves Windows 2000 Help Deliverables.

Focus: Provide feedback on the designs for our Windows 2000 Web Deliverable that is proposed by the Windows.com designers.

Quality/Quantity: Success will be determined by quality of feedback that I give to the Windows.com team.

Time: Win2k RTM time frame.

3. Accomplishment: Integrate multimedia tutorials where they can add value throughout the product.

Focus: Find a complex area of the ResKit, Win 2k Web Deliverable, or Janus and work with the PM to design, develop, and implement the multimedia UI.

Quality/Quantity: Success will be determined by the amount of customer delight when using the multimedia UI as captured by usability tests.

Time: ResKit/Win2k Web Deliverable/Janus time frame

4. Accomplishment: Research Help systems for future releases of Windows.

Focus: Work as the User Interface Designer on the BED UA Polaris Futures Planning team assess user needs for future versions of Server/Enterprise Help.

Quality/Quantity: Success will be determined by completeness of the written assessment of user's needs.

Time: Saturn/Neptune time frame.

Focus: Work as the User Interface Designer on the BED UA Polaris Futures planning team to analyze competitor's Help products.

Quality/Quantity: Success will be determined by completeness of the written analysis of competitor's products.

Time: Saturn/Neptune time frame.

5. Accomplishment: Prototype Help systems for future releases of Windows.

Focus: Work as the User Interface Designer on the BED UA Polaris Futures Planning team evaluate to make interactive prototypes based on the user needs assessment and competitive analyses I complete.

Quality/Quantity: Success will be determined by completeness of the idea and the prototype.

Time: Saturn/Neptune time frame.