GOALS:
- Understand how experienced freelancers and clients manage their current workflow
    - What has happened since last logging on
    - What action items to take
- Understand current interactions with notifications (bell, dash, email)
- Understand current interactions with notification settings
- Uncover latent user needs

INTRODUCTION:

1. **Introduction: self** → Thank you so much for taking the time to participate in our user research study. My name is Audrey, and I'm a product designer at Upwork. I'll be asking you a few questions, observing your actions, and taking notes on our session today.

2. **Introduction: project** → As you may already know, the research I'm conducting is aimed to help me better understand your workflow as you manage your Upwork account and projects. There is no right or wrong action or answer, and this research will help us better understand your usage of different features such as notifications.

3. **Introduction: recording** → We'll also be audio and video recording our interview today. Only the internal team at Upwork will be able to view to the recordings, and neither your name nor any other identifying information will be used in presentations or in written products resulting from this study.

4. Before we begin, do you have any questions?

CLIENT

Background/Profile:
- Tell me about the type of work that you do on the website.
- Is Upwork part of your part-time or full-time job?
- When did you last login to your Upwork account?
- **What prompted you to login the last time?** |**In general?**
- How often do you login to your Upwork account?
- How many active job applications do you have open?
    - Invites?
- How many active contracts do you have open?
- How many contracts have you completed and closed?

Task Analysis:
- How do you figure out what has happened since you last logged into the site?
- How do you figure out what actions you need to take?
- Where would you go to be notified of:
    - Close contract and pay someone
    - Change credit card info
    - Respond to someone

Please show me how you manage the different *contracts* you have open.
- What difficulties or challenges do you have?
- How do you view the activity of your freelancers?
Please show me how you manage the different *job postings* you have open.
- What difficulties or challenges do you have?
Please show me how you manage the different *closed contracts.*
- What difficulties or challenges do you have?

Please open your notifications bell and walk through each of the notifications -- what are your reactions?
- What is the priority in which you would address your notifications?
- Do you experience any redundancies in the notifications you receive? If so, what?

Have there been times where your freelancer missed an action item because of a lack of notification or missed notification?

Have you tried to change notification settings? If so, show me what you have changed (and why). If not, try to change your notification settings.

FREELANCER

Background/Profile:
- What kind of work do you do on Upwork?
- Is Upwork part of your part-time or full-time job?
- How often do you login to your Upwork account?
- When did you last login to your Upwork account?
- What prompted you to login the *last time*? **In general?**

- How many active job applications do you have open?
    - Proposals? Invites?
- How many active contracts do you have open?
- How many contracts have you completed?

Task Analysis:
- How do you figure out what has happened since you last logged into the site?
- How do you figure out what actions you need to take?
- How do you know you need to:
    - Change bank account info
    - Respond to someone

Please walk me through how you manage the different *contracts* you have (open and closed).
- What difficulties or challenges do you have?
- How do you know what you need to act on vs FYI?

Please walk me through how you manage the different *jobs* you're applying to or have applied to.
- What difficulties or challenges do you have?
- How do you know what you need to act on vs FYI?

Please open your notifications bell and walk through each of the notifications -- which notifications do you pay attention to?
- What is the priority in which you would address your notifications?
- Do you experience any redundancies in the notifications you receive? If so, what?

Have there been times when your client missed an action item because of a lack of notification or missed notification?

Have you tried to change notification settings? If so, show me what you have changed (and why). If not, try to change your notification settings.