

Usability Test Plan

Introduction

Spektra Moderated Mobile Usability Test

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Background

The discovery phase for Spektra began in May 2022 with competitive research and user interviews. We discovered that people had a problem with organizing and managing their spending and saving habits. The resulting prototype is an initial hypothesis on how we hope to solve the problem. Now, we would like to test the most important features and functionality for our primary persona Sophia: These features are known as Buckets, Round-ups, and Budget Tracker.

Buckets: Allow people to organize their money in ways that make sense to them - either for savings, or just to remind you where you money should be allocated.

Round-Ups: Save as you spend - all purchases can be rounded up to the nearest \$1, \$2, or \$5 and put away.

Budget Tracker: Set a budget and stick to it - people can create their own budget in the app and view how well their sticking to it as they spend and save.

Goals:

- Assess the usability for new users interacting with the mobile app for the first time
- Observe and measure if users understand the project, it's value, and how to complete certain tasks.
- Collect feedback from users on their experience interacting with the prototype.

Test Objectives:

- Measure how well participants are able to work through the onboarding process
 - Was there any confusion? what were they drawn to click?
- Observe how quickly/ the steps users take to work through the task prompts.
- Analyze feedback after the sessions and determine which areas require the most revision.

Methodology

The usability test study will be conducted online and in person in 20-30 minute sessions.

Participants will be asked to complete 4-5 tasks using the app prototype and will be encouraged to think out loud as they work through the process. After each session, participants will be asked to add any additional feedback about their experience. All sessions will be recorded.

Issue 1: Bucket Set Up Order (HIGH)

Suggested Change: Change the order for the bucket set up page so that people are prompted to enter the name of the bucket>set goal>deposit funds. Additionally, all steps after entering bucket name should be skippable.

Evidence: 83% of testers attempted to set a savings goal before depositing funds into their new bucket. 50% expected to be able to set up multiple buckets first before deciding on goals or depositing funds.

Issue 2: Bucket Information Disclosure (HIGH)

Suggested Change: The buckets set up can be completely re-envisioned so that the set up steps utilize progressive disclosure for each step. This should look like a page for naming a page for setting goals and a page for depositing instead of all on one screen at once.

Evidence: 66% of testers attempted to fill out the buckets set up page in the "wrong" order. when the area they selected first didn't work it created confusion and frustration. When users entered information in the wrong order they expected to be able to use the "deposit" button before it changed colour indicating it was clickable.

Issue 3: Feature Explanations (HIGH)

Suggested Change: All of the features need to have an extra tutorial or explanation for how they work/why people should be interested in them. Incorporate tut pages and information icons that users can interact with in case they need a refresher.

Evidence:100% of testers asked what one of the features was meant for a second or even third time during the tests. Many specifically wanted clarification on what buckets were.

Issue 4: Information Quick View (MEDIUM)

Suggested Change: In the buckets set up and management as well as budget tracker set up and management a quick view option should be available to people so that they can make decisions on how to allocate their money without returning to the home screen first.

Evidence:33% of testers wanted to return to the home page before determining how much to deposit into the bucket and budget tracker. In order to reduce the time it takes to complete these tasks we should include a way for users to quick view their checking balance.

Issue 4: Budget Templates (LOW)

Suggested Change: The budget tracker should be redesigned to provide users with templates that they can edit, rather than having them build a budget from scratch.

Evidence: 33% of testers commented that they would not have the time to set up a detailed budget from scratch. 33% of users also mentioned that they have no previous experience in budget tracking and felt lost when it comes to deciding how to budget their funds. By giving people templates for popular budgeting strategies we help them cut down on time without losing the benefit of budgeting.

Conclusion: In conclusion, the user tests were successful and helped me understand the short comings of the prototype so far. In the future I would like to focus more on specific pain points and diving deeper into why users feel the way they do about certain issues.