

# Usability Test Plan: Spektra

## Introduction

**Spektra:** Moderated In Person & Remote Usability Test

**Conducted By:** Sarah Thielsen

**Date:** August 13-16 2022

**Location:** Calgary, Alberta. and online

## Background

**Spektra** is a responsive web app that allows users to create budgets, set up automatic payments, track their spending habits and organize their money in a way that works for them. Spektra aims to reduce users anxiety around money management by making it easy for users to take control back over their finances.

## Goals

The purpose of this test is assess the usability for new users interacting with my mobile app for the first time. I would like to observe and measure if users understand the project. its value, and how to complete certain tasks like sign up, navigation, and setting up the three main features - round-ups, buckets and budget tracker. Additionally I will be collecting feedback from users after the test to better understand their experience.

## Test Objectives

1. Measure how fast participants are able to work through the onboarding process
  - a. was there any confusion? what were they drawn to click?
2. Observe how quickly/ the steps users take to work through the task prompts.
3. 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.

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## Participants

Participants will consist of a diverse range of at least 6 individuals from my personal network, friends, family and coworkers. I will particularly select participants who identify as neurodivergent.

## Schedule

The usability tests will be conducted from August 12-16. Sessions will be conducted either online or in person.

## Sessions

Sessions will be held for 20-30 minutes each. During the session, participants will be engaging with the Spektra mobile prototype through figma.

## Metrics

**Errors** will be measured using Jakob Nielsen's 0-4 scale:

0 = I don't agree that this is a usability problem at all

1 = Cosmetic problem only: need not be fixed unless extra time is available on the project

2 = Minor usability problem: fixing this should be given low priority

3 = Major usability problem: important to fix and should be given high priority

4 = Usability catastrophe: imperative to fix before product can be released

**Satisfaction** will be measured by asking participants to rate their experience with the application after their session.

## Scenario/ Test Task

TBD

## Test Script

TBD

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## Introduction

Hi \_\_\_\_\_, thank you again for agreeing to participate in some user testing for our new financial app Spektra. My name is Sarah, and I am the designer working on this project! I will be leading this session with you and taking some notes as we go.

In order for you to fully understand what we will be doing today, I would like to go over my plan with you before we begin. I'll also provide some background information on what we're testing and why.

Today, I'll be asking you to try out a new financial app, Spektra, and complete some tasks using the app. I am interested in learning both the positive and negative aspects of the app. Please keep in mind that I am the one testing the app, not you! There are no right or wrong answers; all I need is your openness to share your ideas and opinions. In light of this, please don't worry about offending me! If you provide me open feedback, I can better understand what doesn't work and make adjustments. As we work through the tasks during this session, I ask you to think out loud as much as possible.

With your permission, I will be recording our video call and your screen (voice and screen for in person) for the duration of the session so that I may review our conversation again later [Informed consent form]. If you have any questions during this session please don't hesitate to ask!

Any questions before we start?  
Let's get started!

## Personal Demographic & Background Questions

Before we begin I will just ask you some short questions about yourself in order to help me understand how you might use the Spektra app.

- Age range
- Education
- Gender
- Do you currently use any third party financial apps (any app that isn't directly connected to a bank.)?
- How do you manage your personal finances currently? (apps, spreadsheets, piggy banks, ect.)
- Are there any specific aspects of money management that you would use a financial app for?

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## Open Ended Questions

Thank you for answering those questions for me! I would now like to show you the Spektra app and get your first impressions of the app.

Please spend some time to look around this [the home screen] screen for a while. Can you tell me your initial thoughts without clicking anything just yet? What you like and dislike, your comments on the data on the website, or any other ideas you may have? Always try to think aloud.

Now that you've had a moment to take in the app, what do you think the purpose of Spektra is?

Thank you for your input on that. Next we will be working through some scenarios with the app.

## Tasks

I will be giving you three scenarios and their corresponding activities. Please try to think out loud as you work through each task - don't be afraid to ask any questions as we go!

1. You're a busy young adult who is looking for a way to get ahead with your personal finances but are struggling with the time it takes to organize it all. You recently heard about Spektra, a new financial app and decide to try it out. How would you begin using the app?
2. Now that you've created an account, you're ready to start setting up some features. You've always liked the idea of having a piggy bank but never have time to withdraw money - you've learned that you can set up buckets in Spektra to organize your funds. How would you go about setting up your first bucket.
3. You want a savings solution that doesn't require you to put away lump sums of cash all at once, you know that you can set up round ups on your purchases with Spektra. Where would you find the option to begin saving with round-ups?
4. Finally, you want to stay on track with your budget but don't have time to set up another budgeting app or a spread sheet. you remember you say that Spektra has a built in budget tracker - how would you go about setting one up?

## Wrap Up

**Alright** that's all I needed from you today! Thanks again for helping me understand how i can improve Spektra. Before we go, are there any last minute thoughts/questions you have for me?