

## Usability Test Plan

Kale's Key Features Usability Test Results by Chelsi Ng

Stakeholders: Designer and future users

Last Updated: March 5<sup>th</sup>, 2022

Background	<p>Digital-savvy young adults need a platform to [gain financial knowledge and literacy in a safe way] because [personal finances have never been taught throughout their curriculum]. We will know this to be true when we see [that our users are making real-life financial choices and transactions through our platform].</p> <p>Testing Features: 1. Accessing Account Overview (Onboard) / 2. Updating Profile Details / 3. Setting up a Savings Account / 4. Ease of Use (Effectiveness of the IA &amp; Sitemap Allocation)</p>
Goals	<p>Tested the overall usability of the mobile platform in terms of users' ease of use (locating specific navigational items) and understanding test participants' perspective regarding the platform's user goal.</p>
Test Objectives	<ol style="list-style-type: none"><li>1. Key features included Account Overview (Onboard), Profile Details, and Savings Account.</li><li>2. Gauged users' ability to locate and understand the features' purpose (cognitive load).</li><li>3. Test participants' thoughts and feelings regarding the accessibility and goals of these features.</li></ol>
Methodology	<p>6 Moderated Remote Tests</p>
Participants	<p>The 6 participants fell under the demographic age range that correlated with the primary persona. They included a diverse background including residency, ethnic, and race to minimize sampling bias (how different people from diverse backgrounds react to Kale and what their general impressions were).</p>
Schedule	<p>Moderated remote testing conducted via Zoom over the 2 days of March 2<sup>nd</sup> and 3<sup>rd</sup>.</p>
Script	<p>See link for a more detailed list of all tasks tested: <a href="https://docs.google.com/document/d/109w4Q1AYmEBmcb3gTSluVYbZ5rbHNPKbLI9lFCQMiNg/edit?usp=sharing">https://docs.google.com/document/d/109w4Q1AYmEBmcb3gTSluVYbZ5rbHNPKbLI9lFCQMiNg/edit?usp=sharing</a></p>

## Usability Test Report

### HIGH severity issue 1: Web – Onboarding bypassed/disregarded

Evidence	<ul style="list-style-type: none"><li>• 5 out of 6 participants bypassed the onboarding process on the web</li><li>• Observed hesitation when the onboard features were shown on the sign-up page</li><li>• 20% onboard success rate</li></ul>
Solution	Add text “click to discover our features” as a call-to-action to place visual hierarchy and guide users to explore onboarding features.

### HIGH severity issue 2: Web – Ineffective profile button

Evidence	<ul style="list-style-type: none"><li>• 4 out of 6 participants suggested making the link consistent with other menu items</li><li>• 80% success rate with an average of 27.2 seconds spent searching for profile button</li></ul>
Solution	Revise profile button to show consistency with other menu items (as suggested).

### MEDIUM severity issue 3: Mobile – “Savings Account” vs “Savings Plan” Copywrite

Evidence	<ul style="list-style-type: none"><li>• 4 out of 6 participants mentioned the confusion between the two verbiages</li><li>• Observed unsureness when participants were tasked with setting up the savings plan</li></ul>
Solution	Replace “savings” with “savings account” in addition to making it shown the different account types available on account overview screen.

### LOW severity issue 4: Mobile – Profile avatar mistaken for profile settings

Evidence	<ul style="list-style-type: none"><li>• 4 out of 6 participants had mistaken the avatar as the profile settings</li><li>• Time spent revising their “error” hindered the process of accessing their profile settings</li><li>• All participants learn from the “error” but it placed unnecessary cognitive load</li></ul>
Solution	Allow users to access profile settings on profile avatar as well.

### LOW severity issue 5: Onboard process for mobile/more description on web before signing up

Evidence	<ul style="list-style-type: none"><li>• 2 out of 6 participants mentioned the value of onboarding before signing up</li><li>• 5 out of 6 participants valued the onboarding process to learn more about the platform</li><li>• To reinforce our problem statement, prioritize onboarding before asking users to spend time to sign up will make platform more usable</li></ul>
Solution	Onboard process as a platform overview and feature description piece before signing up.