Kale Usability Test Plan

Introduction	Title: Kale Core Feature Usability Test (First Test) Date: March 1st, 2022 Parties: Designer
Background	Name: Kale User Personas: Jamie & Marcus Problem Statement: 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]. Testing Features: 1. Accessing Account Overview / 2. Updating Profile Details / 3. Setting up a Savings Account / 4. Ease of Use (Effectiveness of the IA & Sitemap Allocation)
Goals	Testing 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.
Test Objectives	1. Key features to test include Account Overview, Profile Details, Savings Account, Education. 2. Testing to gauge users' ability to locate and understand the features' purpose (cognitive load). 3. Test participants' thoughts and feelings regarding the accessibility and goals of these features.
Methodology	1. 2 Moderated In-Person Tests 2. 4 Moderated Remote Tests
Participants	# Of Participants: 6 Recruitment: Personal network Details: Participants fall under the demographic age range of young adults that correlate with the primary persona. They will include a diverse background including residency, ethnic, and race to minimize sampling bias. The idea for such variety is to see how different people from different backgrounds navigate through Kale and they impression of the platform's main goal since financial literacy is rarely taught in school.
Schedule	1. Moderated in-person testing will be conducted at home within the next few days. 2. Moderated remote testing will be conducted via Zoom at the test participants' own location, also within the next few days (March 2nd – 5th).
Sessions	Length: 10-15 minutes Scope: First usability testing to gauge alignment of users' perspective and Kale's overall platform goal.
Equipment	Devices: Mobile device (audio recording), Zoom (remote testing recording), pen & paper, and laptop
Metrics	1. Test participants' overall impression & satisfaction (qualitative measurement through shared thoughts and feelings following session in debrief) 2. Ease of navigation & cognitive load (quantitative measurement in terms of time taken for participants to locate the feature specified) 3. Understanding of the features' purpose & success rate (qualitative measurement asked regarding their impression of what it does prior to access and after accessing the screen)

	4. Alignment of test participants' thoughts and feelings regarding the app versus the app's user goal (qualitative measurement on the thoughts at first impression versus after use)
Test Script	TBD
Test Tasks	TBD

Testing Methods – Usability Components

Satisfaction	Kale's platform should be simple and intuitive for users. The initial usability test should reveal if the prototypes' structure and layout offer that satisfaction component before the addition of UI elements. We want the test to reveal any design structure flaws that need to be fixed or improved before adding colors, UI elements, etc.
Learnability	Our targeted users might not have prior exposure to financial apps as part of their digital use, therefore, they need to be able to understand the goals of the platform when they first encounter it. Kale will adhere to its basic UX components and guidelines, but it needs to have an intuitive approach that first time financial app users will understand how to use it even if they don't understand some jargon.
Efficiency	Given the tasks at hand, we want to know how the test participants are able navigate through and access these features. As young adults, they are digital savvy and being so would be an adequate assessment on the intuitiveness of the app.
Errors	Does Kale provide the ability for users to return to home page where they could start from the beginning if users made a mistake to a wrong screen? How frustrated do test participants gets navigating through it since some of the app's financial jargon might be new? How many tries before the test participants ask for help and before they abandon the app?