

GRA 470 Milestone Three Template FutureFunds Mock-Ups Usability Test Plan

Overview

Scope and Goals

This test aims to analyze the ease of navigation through these mockups as well as the functionality. Specifically the usability test will focus on the visual hierarchy, clarity of the information provided, interaction with certain features such as the calculator and appointment scheduler, and overall navigation consistency. Since there are two different layouts between the desktop and mobile version, the test will analyze which one is more successful, an A/B testing. However, the main goal is to identify where the usability challenges are, improve them, and ensure a seamless experience that's enjoyable.

Resources

The ideal candidates for this test would be a handful of people who regularly use financial services as well as their tools, and those looking to get started. To reach them we would put out surveys via social media to screen the participants. The ideal candidate will have the opportunity to earn a \$25 gift card at the end. Tools that would be used to complete this session would be Zoom where they could share their screen. If they're in their comfortable setting without feeling pressured by someone analyzing them from behind, this tool would be most effective. I would also record the session and give them tasks to complete to make the time specific and orderly.

Script

Welcome and Introduction

Thank you and welcome. Participating in this usability test for FutureFunds is truly an honor and we thank you for taking the time to help us make a difference. Today we will be evaluating how easy and intuitive it is to navigate through our site and the specific features provided. Your feedback is precious and will help us identify where improvement is needed.

Consent and Disclosures

Before we get started, this session will be recorded and all data will be confidential, used only to ensure improvements for this site. I want to confirm that you agree to these terms, do you consent to continue?

Demographic and Screening Questions

- What type of financial services or banking do you often use?
- Do you primarily use desktop or mobile for financial tools?
- Do you or have you ever used a financial calculator online or scheduled an appointment on the web?
- Do you often use financial planning services?
- What do you hope to accomplish when you use these services or tools online?
- Which financial companies are you most familiar with?

Introduction to the Task Table

During this session I will guide you through a few tasks on this website, FutureFunds. The tasks are meant to reflect real world scenarios such as exploring services or interaction with a financial calculator. If you can, please think aloud as you go about completing each task so we can understand the thought process behind interacting.

Follow-Up Questions

- How easy was it to use the financial calculator?
- Was it easy to find?
- Was the “what we offer” section clear and informative? If so, how?
- Was the scheduling process straightforward? Was there any struggle during the process?
- Which version, desktop or mobile, feel better in terms of navigation?
- Were you able to easily find the reviews and testimonials?
- Did the reviews resonate with you? Why or why not?

Concluding Questions

- Upon opening the site, what were your first impressions?
- Which features stood out to you the most?
- Did you at any point feel confused or frustrated?
- Is this a site you would recommend to others looking for financial services?
- If you could change one thing on this site, what would it be?

Closing Instructions

Thank you for taking the time to go through this process with us. Once again, your participation was an honor and we value your feedback. These new insights will help us create a better experience for everyone who uses FutureFunds. As a token of our gratitude we reward you with a \$25 gift card which will arrive via email within 48 hours. Thank you and have a great week.