Quest

Usability Testing

Goal

To assess the learnability and efficiency of users interacting with my money-saving application for the first time on a mobile app. I would like to observe and measure how well new users are able to navigate the app, and complete basic initial functions/flows.

Objectives

1. To see how well first-time users can start a new savings goal i.e. a 'quest'
2. To see how well first-time users can link a new bank account to the Quest app

Test plan

Tester #1	• 20/10/2020, 20.00, In person at home
Tester #2	• 20/10/2020, In own time, Unmoderated
Tester #3	• 21/10/2020, 11.10, Skype
Tester #4	• 21/10/2020, 11.45, Skype
Tester #5	• 23/10/2020, 11.10, Skype

Test script

Hi __

Thanks again for agreeing to complete my usability test! Here is an overview of the test:

The test is meant to measure the appropriateness of my design and is in no way a test of your ability. Any feedback you give will help me to improve my work and understanding of a user's experience!

Please think aloud as you complete the tasks – describe your thoughts and actions, what you're thinking as you go through the app etc.

Here's the testing page where you'll complete the 2 tasks:
https://app.useberry.com/t/xEHttEAj/

After completing that, feel free to explore the normal prototype without tasks:
https://www.figma.com/proto/uffehXNGfH4AUid87Gc9dN/Quest_mid-fi-wireframes?node-id=2%3A0&scaling=scale-down
Any feedback here would be super helpful – what do you like/dislike about it? Is information clearly presented? Does anything confuse you? Does anything seem to be missing or seem unnecessary?

Once you are ready, please record your screen using Screen-cast-o-matic at this link and send me the video once you are finished.
Thank you again! Let me know if you have any questions

Useberry Tasks

1. Start new Quest: You want to start saving towards a new goal. Show me how you'd do this.
2. Link bank account: You want to add a new bank account to Quest to keep monitoring your income and expenses. Show me how you'd do this.

Test notes

Tester #1	
Task #1 Notes Start new Quest	✔ Navigated to 'Start new quest' straight away Problems: - Confusion around 'Goal' vs 'Name' and misleading placeholder text/input field: "Is goal the description? ...The box makes it look like I'm meant to write something" - Likewise, the Date input field should have a calendar/date-selector - Toggle in wrong position: "Is that selected at the moment? Should it not be over here?" - "I'm not sure what you mean by Direct savings... Direct makes it sound like it's automatically going to take money out" - "Is that a heading for all this stuff?" - It wasn't obvious that 'Manual' was still a direct debit - Re 'You need to save...' tip upon clicking Apply: "I didn't notice that appear... Maybe because I was looking down here at the Apply button" - "I wouldn't expect to still see the Apply button, it makes me think that it hasn't applied my changes" "Apply looks like the 'done' button" *Actions to take:* - *Change placeholder text to contain monetary value i.e. £ symbol.* - *Change input field to correspond with date* - *Change toggle position – move to right to indicate it's selected* - *Add another toggle option to 'Turn off' Direct savings, to increase user confidence that it won't automatically take money out* - *Increase heading sizes* - *Change subheadings to 'Automatic direct debit' 'Manual direct debit'* - *Make 'You need to save...' tip more obvious, such as appearing at the bottom closer to the Apply button* - *Either disable the Apply button after entering information or remove completely and have app automatically calculate/apply upon entering information. Put Save button in its place.*

	Suggestions: - Description of different Direct savings: "The text could be fainter" *Actions to take:* - *Improve visual hierarchy of description by making colour lighter*
Task #2 Notes Link bank account	✔ Clicked profile icon and 'Add new account' straight away No issues here
Additional feedback	Positives: - Re spending section: "I like that. I like the tip, that's cool" Problems: - Confusion with quest chart on dashboard: "I'd expect to see the overall total goal since you're combining goals… Makes it look like I've only got £80 saved" "Maybe it would be better if you had several quests you could scroll through" - "There's no reference to time… Time would make the information below more relevant" - no indication of time in relation to progress - It wasn't clear there were spending budgets and wasn't clear what the 'Edit' button did - Wanted to view all spending, transactions and regular payments via a link from homepage *Actions to take:* - *Break quest chart down into separate quests with horizontal scroll* - *Include time on chart and indicator of expected pace to complete quest e.g. '5/10 weeks remaining, you're on track!'* - *Add spending budget amounts to charts and, either change button to Edit budget, or add edit options under main spending screen with link 'Go to spending'* - *Include 'Go to spending' 'View all' etc, but need to design another flow from nav bar that directs to financial activity*

Tester #2	
Task #1 Notes Start new Quest	✓ Completed fine Problems: - Upon clicking Save, he didn't seem to see or acknowledge the 'You need to save £10/week…' tip appear at the top - Confusion around Apply vs Save: "I'm not really sure why Apply and Save need to be two separate steps" *Actions to take:* - *Make user feedback 'You need to save £10/week' more obvious and noticeable, move to bottom* - *Apply vs Save: Remove the Apply button and, in its place, make "You need to save 10/week…" appear as soon as user enters the target date*
Task #2 Notes Link bank account	✓ Completed very quickly no difficulties
Additional feedback	Positives: - "Pretty straightforward and sensible" "Looks good" Problems: - Confused expression when looking at quest chart on dashboard *Actions to take:* - *Make quest chart clearer, breaking down into different quests as suggested earlier might help* Suggestions: - "I'm wondering whether you could you have a tab/swiping approach on the homepage, to swipe through Quests, Spending, Recent transactions" (like Twitter) *Actions to take:* - *Explore pros & cons of swiping vs scrolling on homepage. If I add multiple quest charts with a horizontal scroll then this might be a problem.*

Tester #3	
Task #1 Notes Start new Quest	✓ Successful after some scrolling and clicking around Positives: - Re automatic/algorithm direct savings: "I like the functionalities of this" Problems: - When trying to start new quest: "Add category maybe?" - "What is a quest?" *Actions to take:* - *Remove Add category from homepage and put under main Spending screen* - *Might be a language barrier but nonetheless add a brief description under main Quest screen e.g. 'Quests are trackable goals that help you to save in preparation for a big expenditure'* Suggestions:
Task #2 Notes Link bank account	✓ Successful after clicking settings "It makes sense that it's under profile, I just saw the settings icon there straight away so clicked it"
Additional feedback	Positives: - Liked the animation upon entering pin - "I like that '£200 saved' is in the middle, I can clearly see what I've saved" - "That's nice – I like that if you're overspending it gives you tips" - Re regular payments tip: "This is a cool feature also… It's cool that it tells you what you're spending." - "I like how the home screen shows you a very clear overview of your different expenses and habits" - Re start new quest page: "It's very clear, the UI is well separated" - Overall: "I like the features and functionalities and it's quite simple, which is really nice and easy to understand"

	Problems:
	- Found the quest chart confusing on the dashboard: "My goal for these two quests is £350?" "Maybe you could have two wheels?" - Re quest cards: "I'm not sure what the date is here – 11/01/21, is that the goal?" - Suggested having a 'Turn-off' toggle – "in case you're experiencing a time where you have less money... it would nice to have an option to turn it off, at least temporarily" *Actions to take:* - *Break down chart into separate quest charts. I suggested having them on a horizontal scroll and she liked this solution.* - *Make target date clearer, perhaps with a target icon* - *To account for unexpected expenses and evoke further confidence in user that direct debit is switched off, have a 'Turn-off' toggle*

Tester #4	
Task #1 Notes Start new Quest	✓ Navigated 'Start new quest' straight away Problems: - Exited after pressing Apply – didn't press Save so had to redo. Didn't seem to notice Save button. *Actions to take:* - *Remove Apply and reposition Save as these buttons seem to be causing confusion*
Task #2 Notes Link bank account	✓ Did this straight away
Additional feedback	Positives: - "I like how it says 'It looks like you're overspending here'" - "I like how you can link your bank and it automatically tracks your activity, that saves a lot of time and effort... I tried an app once where I had to add everything manually and I kept forgetting"

- "It's a user-friendly interface, I don't like banking apps usually but this is really nice"
- Re tips: "I really like that idea" "The tips regarding overspending is my favourite feature, that's very useful"
- Liked the overview of regular payments – "Banking apps give a long list of your transactions, so if you see Netflix once it doesn't look so bad, whereas if you have an overview of all your regular payments you can clearly see every month you're spending £10 on Netflix"

Problems:

- Different quest progress on the dashboard chart wasn't clear: "Maybe it's because of the grey I can't tell what the colour codes are" – I suggested having separate quest charts to horizontally scroll through – "yes but be careful it doesn't feel repetitive of the quest screen"
- Re spending section: "I'm not sure what the Edit button would do" "There are no numbers – I know that I'm overspending but I don't know by how much"

Actions to take:

- *Break chart into separate quest charts, ensuring they're not repetitive of quest screen*
- *Write budget amount on spending so the chart is clearer and indicate their expected pace*

Suggestions:

- "You could have a stop light colour scheme"
- Re chart on dashboard: "Maybe include time here like you did on your other quests"
- "You could have an alert/notification system that goes with the overspending tips"
- "You could break-down regular payments into monthly and yearly, so you can see Netlfix is costing you £120 a year"
- "You could have a two-way feedback system to improve and personalise tips e.g. 'was this tip useful?' 'yes/no', and then they can alter the tips they give you, instantly"

Actions to take:

- *Implement traffic-light colour scheme e.g. Red overspending/underachieving, Orange on track, Green succeeding goal*
- *Include time reference e.g. 10 weeks remaining*
- *Have drop-down option under Spending screen 'Display: yearly/monthly/weekly/all time'*
- *Have a X on tips to remove them and inform app whether they were useful or not*

Tester #5	
Task #1 Notes Start new Quest	✓ Eventually successful after hesitation and confusion Positives: - Start new quest window: "I think it looks good… I think it's clear" - No problems noticing the tip appear at the top - "I like that" Problems**:** - "I'd instinctively want to press on the groceries and try to drag it" - Confusion around quests chart and spending bars (we thought this might be due to the greyscale and colour-code not being implemented yet): "I saw Holiday and Presents up here, and Groceries and Eating out down here so I thought they didn't look connected, but thought no, they must be connected" "I thought this was made up of the spending bit" "I thought if I dragged the bar it would translate onto the chart" - On Homepage: "I'd ideally want a box up here saying Start new quest" - On Start new quest window: "What is the 'name'? What does that mean? …I feel like name should be the goal, like 'party' is the goal… That's what comes to mind when I think of 'goal'" *Actions to take:* - *Make Spending bars clearer – i.e. include budget amount, don't make the bar look clickable or draggable* - *Make sections on homepage clearer and ensure they don't look connected – increase heading size and increase spacing* - *Change 'Go to quests' CTA to 'Start new quest' – this is the primary task of the app so it makes sense that users can do this straight away from the homepage. This will also help to avoid the potential issue of Quest screen being repetitive of separate quest charts* - *Change 'Name' to 'Goal', and current 'Goal' to 'Amount'*
Task #2 Notes Link bank account	✓ Successful after some hesitation – hovered over Settings (although didn't click), then clicked Home before trying Profile
Additional feedback	Positives: - "I like this" "I like the tips" - "Add category – I like that"

- Re Regular payments tips: "ooh that's cool, I like this"
- Re Apply button: "I like that you can see what it looks like before you save anything"

Problems:

- Re Edit buttons under Spending: "They look quite admin-y, like an admin would edit them"
- Confusion re quest chart on dashboard: "Are these different milestones? £90's a bit random"
- Re quest charts: "I think the total should be bigger... I didn't see it until much later... I'd rather see the bigger goal [than the smaller amount to go]"

Actions to take:

- *Move Edit buttons to Spending screen and be more explicit with budget*
- *Break chart down into different quests*
- *Swap visual hierarchy of goal amounts – make total goal more noticeable than amount to go*

Suggestions:

- Re Direct savings progress: "I was expecting this to be more of a chart, like the Spending, so a bar of what it should be vs where you are at"
- "I kind of wish there was a '!' at the end of Morning, Georgia. Morning, Georgia sounds a bit meh"

Actions to take:

- *Adding another bar might clutter and overcomplicate the dashboard. Might be redundant too, as the quest chart already shows goal progress, whereas the Direct savings is just a tool to help reach the goal. Having too many charts to interpret might put users off. Perhaps keep text but just reduce it.*
- *Add a '!' to make 'Morning, Georgia' sound chirpier/friendlier*

Results synthesis

Main issues	Error Rating	Suggestion(s)
Homepage: 0/5 participants understood what the breakdown of goal amounts were on the quest chart (confusion when interpreting the chart) "My goal for these two quests is £350?"	4	Break chart down into separate quests with a horizontal scroll. Swap visual hierarchy of goal amounts – make total goal more noticeable than amount to go.
Homepage: 0/5 participants realised that Spending charts were budget-based. Didn't know what 'Edit' button would do. "I know that I'm overspending but I don't know by how much"	4	Add budget amount to charts with an indicator of the amount users are currently at. Move 'Edit' button to main Spending screen.
Homepage: Quest chart lacked usefulness as no reference to time. Users weren't sure how long they had left in relation to their saving progress.	3	Add time reference to quest charts on dashboard and indicator of expected pace to complete quest e.g. '5/10 weeks remaining, you're on track!'. Could have gap between progress vs expected pace colour-coded (Green for succeeding, Orange for on track, Red for behind).
Homepage: Wanting Spending, Recent transactions etc to link to a main page	3	Create new navigation for financial activity – create 'Activity' screen and add to nav bar. Under Activity, have tabs for Spending, Regular payments, and Recent transactions.
Homepage: Would prefer 'Morning, Georgia' to have a '!', so it sounds friendlier	2	Change to 'Morning, Georgia!'
Quests: Users not certain about what the date on cards was referring to	2	Make quest cards clearer by improving visual hierarchy and adding target icon to date. Be more explicit about progress, e.g. 9/11 weeks remaining.

'Start new quest' window: Confusion around 'Name' and 'Goal' – not certain what information the fields were asking for "Is goal the description? …The box makes it look like I'm meant to write something"	4	Ensure input fields correctly align with response, e.g. £ symbol when asking for amount. Change 'Name' to 'Goal', and 'Goal' to 'Amount'.
'Start new quest' window: Confusion around Apply and Save buttons "Apply looks like the 'done' button" "I didn't notice that appear… Maybe because I was looking down here at the Apply button"	4	Have the tip and direct saving calculation appear as soon as user enters details, so that there's no need for an Apply button. Put Save button in its place.
'Start new quest' window: Make tip more noticeable	3	Now I've decided to remove the Apply button, this tip might be more noticeable. Nonetheless, move tip towards bottom as this is where users' gaze will be.
'Start new quest' window: Confusion around Direct savings and what the toggles would do	3	Add another toggle called 'Turn-off', so users are 100% confident that no direct debit will be implemented. Improve visual hierarchy of Direct savings descriptions by making colour lighter.
'Start new quest' window: Improve toggle system to increase user confidence	2	Make toggle behaviour align with expected design patterns (move to right when on)