

USABILITY TEST PLAN: Stacks

Samantha Matchett

Introduction

Stacks mobile test by Samantha Matchett

Stakeholders: Samantha Matchett and Career Foundry

Background

Stacks wants to offer users an all-in-one banking experience that allows them to send and receive money from friends, pay bills, and create and monitor budgets and savings goals.

Goals

Our goal is to test the usability of the Pay, Budget, and Save features making sure that the design is intuitive and memorable. We will know that our users are successful when they can easily send money to a friend, create a new budget, add a new savings goal, and navigate through the web application without struggles or confusion. We will also follow up with questions and take comments and suggestions from the testers

Test Objectives

How easy is it to send money to a friend?

How easy is it to add a new budget?

How easy is it to add a new savings goal?

How easy is it to navigate through the application?

Encourage users to explore the application to help understand ease of use.

Methodology

The tests will be conducted as moderated remote testing where the users will use their phones, computers, or tablets to complete the tasks at their residence.

Participants

We will test between 5-6 participants who are all from the personal network of Samantha Matchett. The participants will know how to make video calls and will be comfortable having a remote test.

Schedule

The sessions are scheduled to take place on the week of August 1-7, 2021, either remotely or in-person, where I will welcome the participants at my home office.

Sessions

Sessions will take 15-20 minutes

Equipment

Participants will be provided with a figma link. The remote sessions will take place over zoom and participants will be asked to share their screen.

Metrics

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 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

Introduction

Hi _____

My name is Samantha, thank you so much for being here today. I am going to be walking you through today's session. I am conducting usability tests to evaluate how intuitive the design of a prototype for a financial app called Stacks is. The session should last 10- 15 minutes.

What you will be testing is a prototype, meaning it is likely full of mistakes and errors. This isn't at all a test. You cannot get any answers wrong, and the feedback you provide to me during this session will help me better represent the needs of users just like you. The best way you can help me is by thinking out loud as much as possible.

This session will be recorded to allow me to focus my attention fully on the present session and analysis the session deeper later. The feedback you provide will only be for internal use.

If you have any questions at any time feel free to interrupt me or the session to ask them.

Do you have any before we begin?

Okay, great. Let's get started. I'd like to start off by asking you a few questions about yourself before we begin with the prototype tasks.

Demographic Questions

- please tell me your age range

- 21 - 25 years

- 26 - 30 years

- 31 - 35 years

- 36 - 40 years

- More than 40 years

- Do you use any special equipment, such as a screen reader, with your computer or phone?

- Which device and how often?

Background Questions

- How much do you trust banking applications to store your personal information/ payment methods (credit cards, debit cards, bank accounts)
- Do you have experience using money sending applications? How often do you use them?
- Do you currently use any applications for budgeting/saving?

Open-ended Questions

Thank you for answering those questions. I would now like to give you the opportunity to explore Stacks on your own and get your initial impressions.

Spend some time looking over this screen without clicking anywhere. What is your first impression? What do you like? What do you not like? What do you think about the information displayed on the page? Do you have any other thoughts? How would you start by using this application? Where would you click first? (dashboard)

Now that you've looked over Stacks, what do you think the purpose of the app is?

Thank you, now I would like to move on to specific task. I'll give you a scenario and the corresponding activities. Remember, the best way you can give feedback is by thinking out loud, letting me know what you're thinking and feeling as you navigate through the tasks, okay?

(Note to facilitator: Ask open ended questions if needed)

Direct Tasks and Scenario Tasks

Scenario 1: You just bought a new car and you need to add to car insurance information to your budget.

- Task: Add a new budget for your car insurance.

Scenario 2: Imagine you're out at dinner with a few friends and you need to send one of them money for the bill.

Scenario 3: You want to start putting money aside for a trip coming up.

- Task: Add a new savings goal

Satisfaction and Follow-up Questions

Great, thank you so much for following through the session. We are almost done! I'd just like to ask you a few follow-up questions.

First, do you have any additional thoughts on the tasks you just completed?

1. How satisfied were you with the usage/usability of this app?
2. How easy did you find it to complete the tasks?

3. What has been the most challenging part? What did you dislike the most?
4. Do you have any additional thoughts or any recommendations you would like to share with me?

Wrap-up