


Usability Test Plan And Script



PlutoPay



Usability Testing Details

Introduction

Moderated Usability Test for PlutoPay
Moderator: Kristine De Chavez Rath

Background

PlutoPay provides users a robust digital wallet/e-finance solution suite that allows them to conveniently and securely manage their financial data in a singular location, use their money for purchases, transfers and currency conversions and access and leverage tools and rewards to do more than just banking- all wirelessly and cashless, all day, everyday, anywhere.

Goals

The goal of this study is to test features of PlutoPay to determine opportunities to further enhance the overall experience in the app before development. The participants' actions, thought processes and body languages will be observed as they navigate through PlutoPay's interface per the tasks given to them.

Test Objectives

The objective of this test is to gauge PlutoPay's usability through the observation of users' interaction with the app while completing basic tasks, including:

- Completion of the onboarding process
- Use of the Virtual Assistant tool
- Ability to Send Money Person to Person vs Sending Money Worldwide
- Ease of Splitting a Bill
- Efficiency of Wireless payments leveraging QR codes or NFC

As well as overall impressions regarding:

- Function, features and layout
- Pain points and areas of improvement
- Suggestions

Methodology

The study is a mix of moderated in-person and moderated remote testing session – all conducted using Google Meet on their mobile devices to test the mobile app prototype of PlutoPay. Six participants were gathered to complete tasks and give their feedback as they navigated through the app. The sessions ran around 20-30 minutes.

Participants And Schedule

Six participants were recruited - 3 women and 3 men, age ranging from 25-64 from different backgrounds and levels of experiences using digital wallet/e-finance solution tool.







Testing sessions (both in-person or remote) was conducted during the third week of March. Location and time was arranged at the convenience of both the participant and the researcher between 12:00 PM - 10:00 PM CST.

Sessions

Testing sessions will be approximately 20-30 minutes for each participant.

Each session will consist of the following:

- Brief introduction of PlutoPay
- Use of an Adobe XD prototype
- 2-3 testing tasks of key features (Account Management, Paying/Requesting/Sending Funds)
- Debrief followed by feedback and follow-up questions.

 P1: Jeffrey	 P2: Mary Rose	 P3: Venus	 P4: Nhil	 P5: Kyle	 P6: Nicole
Male 25-34	Female 35-44	Female 55-64	Male 35-44	Male 45-54	Female 35-44
Agency Consultant	Logistics Manager	Registered Nurse	Quality Systems Manager	Store Manager	Bank Relationship Manager
Advanced user of banking and financial tools	Skeptical of using an all in one management app	Does banking on desktop; mobile if necessary	Advanced and technical user of banking apps	Basic usage of financial and transactional apps	Expert in banking transactions and requests
Professional, Organized	Budget-Conscious, Curious	Traditional, Very Cautious	Tech-savvy, Detailed	Concise, Not as Expressive	Quick answers, To the point
Open	Casual	Slightly Nervous	Enthusiastic	Tired	Animated
Mon, March 20 7:00pm - GMeet	Mon, March 20 8:00pm - P2Home	Tues, March 21 1:00pm - P3 Home	Tues, March 22 6:30pm - GMeet	Tues, March 21 8:00pm P5 Home	Tues, March 21 9:00pm - GMeet

Equipment

RESEARCHER

- Laptop
- Script
- Google Meet

PARTICIPANT

- Laptop
- Mobile Phone
- Google Meet

Metrics

Usability errors will be measured using Jakob Nielsen's rating scale:

- 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

Learnability – measured by percentage of success rate:

$(\text{Success} + (\text{Partial Success} \times .5)) / \text{total \#of task attempts} = \text{Success Rate \%}$ s given to them.



Test Script - Introduction

Introduction

Thank you again for taking the time to participate in this user testing session. I'm Kristine Rath, the UX designer for this project.

Today, I'll be asking you to navigate through a new e-wallet finance management application we're developing called PlutoPay. I will be giving you some tasks using the prototype of this app. The goal of this study is to test features of PlutoPay to determine opportunities to further enhance the overall experience in the app before development. We hope that the feedback we get from you and other users, we'll be able to deliver a successful application to market.

We want you to feel comfortable and at ease during this session, so please don't hesitate to ask any questions you may have. We are testing the application and not you or your ability. There are no right or wrong answers—we are just looking to hear your honest feedback. We'll begin with a few general questions about finance apps, then move onto some tasks using PlutoPay. During this usability test, we'd like for you to narrate your actions or "think out loud" as much as possible so we can understand your experience - your thoughts and feelings from your point of view - as you explore the app. Take your time! Feel free to say and ask anything - Remember, this is a safe space, and we're here to learn from you. You won't hurt anyone's feelings! Talk through things like your expectations of where something might be or if you're stuck on something. I'll get it noted and help you get back on track. Should you need a break at any point during the testing session or if you'd like to end the session early, please let me know. Do you have any questions before we get started?

With your permission, we're going to record our session. The recording will only be used to help us figure out how to improve PlutoPay, and it won't be seen by anyone except the project team. Would it be okay to proceed with the recording and begin? Awesome! Let's get started.

Test Script - Background

Demographic Questions

Before we dive in to the app testing, I'd like to get to know you a bit better.

Could you tell me what your age range?

18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+

What is your occupation?

Background Questions

I also have a few short questions to help us gauge how you might use PlutoPay:

- How do you prefer to manage or keep track of your personal finances? and why?
- Can you tell me how many banking apps do you have? An how many you use daily?
- What would you say are the 3 main tasks that you use your banking apps for?
- Which app is your favorite and why?
- What features do you look for in a banking/finance management app?
- How would you describe your ideal ewallet/finance management app?

Begin User Testing Session

We will now begin looking at PlutoPay's interface. This is currently just the prototype of the app. Please open the link I provided you in the calendar invite i sent for this session, I have the link in the session chat for your convenience as well. Please share your screen. I'll now give you a few scenarios with corresponding tasks to complete. As a reminder, please narrate or think out loud as you navigate through the app. If you get stuck at any point, please feel free to ask me any questions. There will be instances that I will also ask some questions in between the scenarios. Please know that it's not because you are doing anything wrong - we just want to know more about your thought process behind something. Like mentioned before, we are not testing your ability, but how the app functions.

Test Script - Questions and Scenarios

Getting Started / Onboarding

You've just downloaded PlutoPay on your mobile phone. Please sign up for an account and access your home page.

- How would you describe or what did you think about your onboarding / account sign up experience?
- What is your expectation of what onboarding should be? What is your expectation of how long signup should be?

From the homepage, engage Luna and ask her the balance of one of your accounts.

- How was your experience of locating Luna?
- What do you think about the virtual assistant, Luna's function? In general?
- Can you tell me the apps that you've used that have something similar?

Social Transactions

Your cousin called – she needs to borrow funds for unexpected repairs to your ancestral home. You need to send money to the Philippines.

- How would you go about doing that?
- How safe do you feel making transactions like this in the app? And why?
- Describe the likelihood that you might authorize an accidental transaction? Can you describe what can cause or prevent accidental actions?

It's time to pay the rent and you are collecting the funds to split a bill using PlutoPay.

- How would you go about doing that?
- How did you find the process of splitting a bill?
- How does this process compare to how you would normally split a bill amongst friends?

Mobile Wallet

You are at the grocery store checkout line and it's time for you to pay for your purchases.

- How do you proceed?
- How does this process compare to other apps with the same capability?

General

Explore the app (*give user time*)

- What are your thoughts about the nav? Design?
- What are features you liked? What can be better?
- What function/feature is confusing and why?
- How effective is this app in meeting your expectations for your ideal eWallet or finance management tool?
- On a scale of 1-10(best), please rate the following:
 - Usefulness of the App
 - Ease of Use
 - Satisfaction with the app
 - Likelihood of you downloading or using the app
 - Likelihood of recommending to friends

Wrap Up

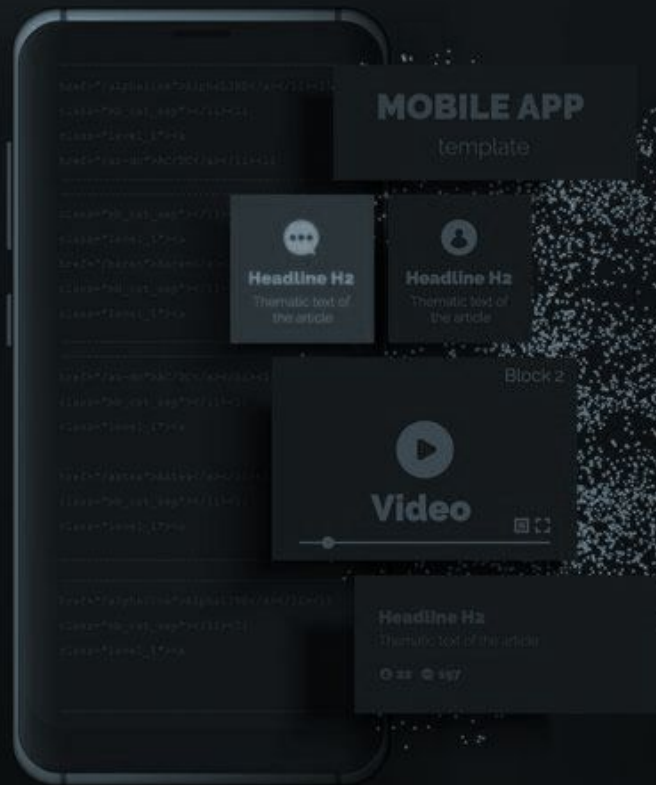
Thank you so much! We have reached the end of our session. This has been very insightful as we improve PlutoPay.

Do you have any other questions or feedback for me before I end this recording?

We greatly appreciate your participation. Have a wonderful day!

UX

USER
EXPERIENCE
design



THANK YOU