

Quick Apply Usability Testing

Link to provide:

IL: <https://previewc.moneymart.ca/quick-apply?loanType=IL>

SPL: <https://previewc.moneymart.ca/quick-apply?loanType=SPL>

Steps:

1. Introduce myself and Craig
2. Provide link
3. Mentions few things before we start
4. Provide scenario and task

Participant Information:

- Name:
 - Age:
 - Gender:
 - Occupation:
 - Technical Proficiency:
 - Experience with Similar Products:
 - Any Additional Notes:
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Purpose of the testing:

- We are in the growth team for Money Mart
 - We may become desensitized to the application because we've designed and seen this many times, so your input would give us fresh pov.
 - Also, close contact with customers informs our innovations.
 - Introducing Quick Apply: a streamlined process for faster approval results compared to existing methods.
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Instructions to Participant:

- Please think aloud while performing tasks.
- There are no right or wrong answers, we are testing the system, not you.

- If you encounter any difficulties or have suggestions, feel free to share.
- The link we will provide isn't fully perfect and configured in the system bc it's still in the test environment and therefore results may show declined but most importantly we want to see your experience
- Your feedback is valuable and will help us improve the Quick Apply loan application experience.
- Now will provide you a link and scenario and task once you open the link please share your screen with us so that we can view your experience and also ensure to follow the figure in scenario
- Also make sure to sign out when you before you close the current link

Hello, and thank you for taking the time to participate in our usability test for the Quick Apply loan application experience. Before we begin, I'd like to go over a few important points:

Firstly, as you go through the tasks today, please think aloud. This means verbalizing your thoughts and actions as you navigate through the system. This will help us gain valuable insights into your user experience.

Secondly, I want to emphasize that there are no right or wrong answers here. We're testing the system, not you. So, please feel free to explore and interact with the application as you normally would.

If you encounter any difficulties or have suggestions along the way, we highly encourage you to share them with us. Your feedback is incredibly valuable and will directly contribute to improving the Quick Apply loan application experience for users like yourself.

Also, I want to mention that the link which I'm going to give you may not be working perfectly because it's for testing before production. However, this is precisely why your input is so valuable.

Lastly, before we proceed, I would like to ask for your permission to record this session. Recording will help us accurately capture your feedback and ensure we don't miss any important details. Is it alright with you if we record our conversation today?

- Make sure to sign out
- System isn't configured actually yet

Now, I'll provide you with three scenarios, and for each scenario, I'll give you specific tasks to complete within the Quick Apply application.

Task & Scenario List:

Scenario 1:

You're a 20-year-old unemployed student living with your parents in Winnipeg, Manitoba. You're eager to pursue a master's degree but need financial assistance to cover tuition fees and living expenses. You've decided to explore installment loan options to support your education.

Task:

Apply for an installment loan by following the provided steps and completing the application process.

Scenario 2:

You are retired and living in Orillia, Ontario and your current source of income is pension from the government. Suddenly, your car breaks down, and it requires immediate repairs to make it operational again. This unexpected expense has left you in need of quick financial assistance. You're exploring options to apply for a Cash Advance loan to cover the repair costs and get back on the road swiftly.

Task:

Apply for a Cash Advance loan by following the provided steps and completing the application process.

Scenario 3:

You're a 43-year-old electrician working in British Columbia, Canada. Despite earning a steady income of \$5000 per month, you've encountered an unexpected situation. Your family back in Chile is facing financial difficulties, and you want to support them during this challenging time. You've decided to explore options to apply for a Cash Advance loan to send them much-needed financial assistance.

Task:

Apply for a Cash Advance loan by following the provided steps and completing the application process.

Task Scenarios:

Task 1: Apply for IL/SPL through Quick Apply application.

- See the welcome page
- Fill out the required fields in the application form.
- Submit the application.

Task 2: Proceed OTP

- Navigate to verify phone number.
- Receive the code via phone.
- Enter OTP code

Task 3: Get to Pre qual page

- Review what is available for them
 - End the session
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Post-Task Evaluation Questions:

On a scale of 1 to 5, how easy was it to complete the task?

- (1 = Very difficult, 5 = Very easy)

Did you encounter any problems while completing the task? If yes, please describe.

Were any parts of the interface confusing or unclear? Please specify.

What did you like about the interface or user experience?

What improvements would you suggest to enhance the loan application process?

Additional Comments:

Observations:

- [Notes on participant's actions, comments, and reactions during the test.]
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Overall Impressions:

- [General thoughts on the usability of the loan application based on the testing session.]

This template is specifically tailored for a loan application, covering tasks that a user might typically perform during the application process. Adjustments can be made based on the specific features and requirements of the loan application being tested.

Email to testers

Before our meeting, I'd like to provide some context to help streamline our discussion. We'll be conducting usability testing for a new feature in the Money Mart product. Your feedback is incredibly valuable as you have direct insight into our customers' needs.

The feature we'll be focusing on is called Quick Apply, aimed at enhancing user experience by simplifying the loan application process. With Quick Apply, users will be guided through a shorter application process compared to the existing system. They'll receive a pre-qualified page upfront, outlining what loan options are available to them. Importantly, this process involves a soft bureau check, meaning it won't impact users' credit scores.

Testing Guidelines:

- Scenario Instructions: I'll provide you with scenarios to guide your interaction. Just imagine yourself in the scenario described and proceed with the tasks accordingly.
 - Phone Number Input: When prompted for your phone number within the application, please use your own phone number for consistency.
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