

Navigation Redesign – Usability Benchmark

Research Brief
October, 2020

Background

Customer feedback from app store comments and the call center have indicated that navigation and findability of some content is a persistent challenge for our customers. After multiple rounds of card sorting and tree tests a revised IA has been proposed as an improvement over the current version.

THE ASK

Evaluate localization of several key tasks that have been difficult to find in previous screen iterations, namely:

Lock or freeze card

Stop payment on a check

Enroll in paperless statements for checking account

Reorder checks

Activate new credit card

Send money to a friend using Zelle

Enable touch ID (labeled “Mobile security settings” for test purposes)

ACTIVITIES

1. Evaluate Navigation of Customer Top Tasks

1.1. Remote unmoderated usability testing

Evaluate people’s ability to locate items detailed in top tasks above to bolster confidence that the current version of labels and screens are not challenging for customers to locate these tasks. Testing will include both U.S. and Canadian participants so future screens may be used both North and South of the border.

Prototype for testing: <https://57h7x3.axshare.com/>

Each participant will be presented with 3 of the 7 tasks and analysis will look at performance of both the first performed task as well as those that have the benefit of being performed second or 3rd. Task order will be manipulated in a latin-square design.

Lock or freeze card:

1. You may have lost your debit card but are not sure. Lock your debit card so it cannot be used until you determine whether it is really lost or just temporarily misplaced.
2. What, if anything, was confusing or difficult about locking your debit card?
3. Consider the overall steps involved in locking your debit card. Rate your experience in locating this functionality and explain why you chose this option. [5-point Rating Scale: Very difficult to Very easy]

Stop payment on a check:

1. You realize that a check you wrote is not correct. Stop payment on check number 134 to make sure the check does not get cashed.

Enroll in paperless statements:

1. You no longer want to receive monthly statements for your checking account by mail. Enroll in paperless statements for your checking account.

Reorder checks:

1. You have been writing a lot of checks lately and only have a few left. Order some replacement checks for your account.

Activate a new credit card:

1. You received a new credit card in the mail. Activate your new credit card using the app.

Send money to a friend:

1. A friend paid for your dinner and you want to pay them back. Send money to a friend using Zelle.

Enable touch ID:

1. You want to change the pin for your bank app. Locate the mobile security settings on your app.