

## Amanda Long

### Mobile Pre-Login Marketing Carousel

#### Overview

The Mobile Pre-Login (MPL) Marketing Carousel is the content users see after they open App X, the app for financial Company Z, but before they login to said app. Its purpose is to highlight the app's features and capabilities, and ultimately convince users who don't already have an account to open one. It has had several iterations over time, but the current prototype consists of four "Welcome" screens with large stylized drawings in brand colors, and brief descriptions of several of Company Z's products. Users can swipe back and forth to see the different screens, and there is a "Login" button and an "Open an Account" button at the bottom of each. The prototype also has four screens that are not part of the Marketing Carousel. I did not focus my research on those screens, but collected data on them nevertheless as they are part of the user's experience.



I am a UX Researcher at Company Z. As such, I was responsible for creating screeners and protocols, scheduling and interviewing participants, usability testing, synthesizing data, and reporting my findings to my cross-departmental team. The primary focus of this research was usability testing.

## Problem Definition

Company Z has been pushing to digitize its interactions with users – hence App X. The MPL Marketing Carousel is content specifically designed to encourage users to sign up for an account. The team wanted to know how the new content compared up to the previous design, and if it helped users understand what the app can do to help them achieve their financial goals.



My goal was to conduct various usability tests on the new prototype (task completion, surveys, SEQs, SUS, etc.) to identify usability issues, observe what content is or is not viewed, compare its content and interface to the existing carousel, and to better understand if the pre-login experience is helping users understand the products Company Z is offering, and how those products can help them achieve their financial goals. My measure of success was identifying usability issues, getting a comparison between the new prototype and the existing carousel, and better understanding user behavior with regards to understanding the content and how it can help them. I shared my findings with the team, made suggestions for improvement, and will retest the new design.

## Audience

The target users for this study were people who manage their financial accounts online.



## Team/Role

I took the lead on the research for this project and I was responsible for creating screeners and protocols, scheduling and interviewing participants, usability testing, synthesizing data, and reporting my findings.

I was however, extremely lucky to work with a very talented team. They are:

- **Craig:** UX Researcher
- **Hyesoo:** UX Designer
- **Laura:** Managing Director
- **Tobias:** Product Owner
- **Olga:** Marketing Manager

## Constraints

I encountered several constraints with this project. Initially I wrote an unmoderated study on UserZoom but found that participants weren't viewing some of the screens, and were talking about the app's visual design instead of its content. I quickly realized that I needed to conduct a moderated study instead. I also ended up using guerilla recruiting tactics to recruit from my network of friends and acquaintances as our recruiting software was having technical difficulties.

## Design Process

In order to create the appropriate usability tests for this study I did a lean canvas exercise with the team. Armed with the appropriate research questions, I got to work creating a screener. I excluded people who already had an account with Company Z because I didn't want anyone already familiar with the app, and I excluded people who didn't have any financial accounts. They also had to have checked their finances online within the past 6 months, and could not work in the financial industry. I then created the protocol and the test in UserZoom. I tested it on several of my co-researchers, and after a few tweaks, launched the study.

After watching the unmoderated interviews and reading the user responses it became apparent that a moderated test was needed. I re-wrote the protocol, designed a different test on UserZoom, and tested it on my co-researchers. Then I started the recruiting process. Our typical method of recruiting was having technical issues so I reached out to people I knew that had iPhones (the prototype was iOS only) until I found 5 people who passed the screener and were willing to participate. I got them scheduled and conducted the interviews. I asked the participants to think aloud as they explored the app. I then had them look at each screen from the marketing carousel and talk about the content they saw there. Then I had them do SEQs about ease of use, and usefulness of the app, followed by the SUS. I finished up the interview by asking them to report their current financial goals and rate the app's usefulness with that goal in mind.



Next, I watched recordings of the interviews and made notes. I identified patterns and distilled my key findings. I then created a report and presentation (including clips of the test participants encountering specific issues) to share with my team. Finally, I presented my findings and answered the team's questions.

### The main takeaways from this project were:

- Most participants immediately went to "Open an Account", barely skimming the first screen of the marketing carousel and missing the following three screens completely.
- Many said the experience of the welcome screens was easy and straightforward, but that it did not match up with the experience of the "Open an Account" screen which they said was overwhelming, difficult, and lacking context.
- Several participants did not understand some of the types of accounts offered and wanted explanation as to what they were.
- Some participants expected the "Open an Account" screen to have an introduction explaining what to do and then asking them pertinent questions about their financial goals.

- Some participants did not find the screens that weren't part of the marketing carousel. Others got lost on those pages and needed help navigating back.
- Most participants said the content was helpful, but not personally useful. Rather than reading generic content, they wanted to know what Company Z could do specifically for them.
- When compared to the prior marketing carousel's content, participant perception did not change.
- Users don't read, they scan.

### **Opportunities for optimization:**

- Consider offering a guided tour that showcases app functions in relation to specific financial goals.
- Consider offering a guided tour that helps users better navigate the "Open an Account" screen.
- Consider offering a guided tour that offers more in-depth information and explanation of what the accounts and products Company Z offers are.
- Consider replacing fine print with easily digestible bullet points.

### **Retrospective**

I enjoyed working on this project. My research yielded helpful insights and I got to work with a great team. I look forward to the next tests.

### **Steps:**

- Identify areas/concepts to be tested
- Create screener
- Create usability test protocol (script)
- Recruit and schedule participants
- Interview participants
- Synthesize/analyze data for insights
- Present findings

### **Deliverables:**

- Presentation of findings

### **Methodologies:**

- Recruiting
- User interviewing
- Usability testing - task completion, learnability, surveys
- Evaluative research
- Data synthesis
- Presentation of findings

