Inclusivity Walkthrough

Overview

Date: 5/16/2025

Team: 3

- Facilitator: Adrien Protzel
- Evaluators: Konner Frederick

Design: Adrien's IOS app for transaction tracking

Persona: Abi

- Age: 25
- Employment/Position: Accountant
- Location: Corvallis, OR
- Pronouns: She/Her
- Background and Skills: Abi has recently developed a strong interest in managing her personal finances more effectively. She holds multiple credit cards and maintains both savings and checking accounts across different banks. With a solid background in accounting, Abi is confident in tracking and managing her money. However, she is now seeking a more streamlined and convenient way to view and manage all her financial accounts in one centralized location.

Contents

Walkthrough

Scenario: Abi wants to check her total balance across all accounts before making a large purchase.

Subgoal #1: Open the app and log in securely

Will Abi have formed this sub-goal as a step to their overall goal?

- YES

- **Why?**
  - Their aren't many other options other than creating a new account, so they should be able to follow the process to log in.
- **Which facets are involved?**

  X Motivations
  X Information Processing Style
  X Learning by Process vs. Tinkering
  Computer Self-Efficacy
  Attitude Toward Risk
  None of the above

Before Action #1: Tap the app icon and enter login credentials

Will Abi do this?

- YES
  - **Why?**
    - It is very clear what Abi needs to do. It is unlikely they would click on anything else or enter different credentials.
  - **Which facets are involved?**

    X Motivations
    Information Processing Style
    X Learning by Process vs. Tinkering
    Computer Self-Efficacy
    Attitude Toward Risk
    None of the above
  - **What in the UI helped/confused Abi in this step?**
    - **There was text that explicitly explained what button logged them in.**

After Action #1: Abi is taken to the main dashboard showing her total and individual account balances

If Abi does this, will they know they did the right thing and are making progress toward their goal?

- YES
  - **Why?**
    - They will now see their main dashboard indicating that they have successfully logged in.
  - **Which facets are involved?**

    Motivations X
    Information Processing Style X
    Learning by Process vs. Tinkering
    Computer Self-Efficacy
    Attitude Toward Risk
    None of the above

- **What in the UI helped/confused Abi in this step?**
  - **The main page indicates that they are now in their account.**

Subgoal #2: Add an account

Will Abi have formed this sub-goal as a step to their overall goal?

- YES
  - **Why?**
    - They will see the "Add Account" button with a plus sign to intuitively know that they need to click it. Then that will redirect them to securely link their account.
  - **Which facets are involved?**

    Motivations X
    Information Processing Style X
    Learning by Process vs. Tinkering
    Computer Self-Efficacy X
    Attitude Toward Risk
    None of the above

Before Action #2: Abi looks at the dashboard to add an account

Will Abi do this?

- YES
  - **Why?**
    - The dashboard clearly shows an add account functionality, so Abi won't be confused about what to do.
  - **Which facets are involved?**

    Motivations X
    Information Processing Style X
    Learning by Process vs. Tinkering
    Computer Self-Efficacy
    Attitude Toward Risk
    None of the above
  - **What in the UI helped/confused Abi in this step?**
    - **Clear text saying "Add account".**

After Action #2: Abi adds an account

If Abi does this, will they know they did the right thing and are making progress toward their goal?

- YES/MAYBE
  - **Why?**

        - Most likely Abi will follow the Plaid instructions, but there is a small chance they get confused or worried that they did something wrong since it brings them to another site.
    - **Which facets are involved?**
        Motivations X
        Information Processing Style
        Learning by Process vs. Tinkering
        Computer Self-Efficacy X
        Attitude Toward Risk X
        None of the above
    - **What in the UI helped/confused Abi in this step?**
        - **There was text to let Abi know they were being redirected, however there should be some more explanation as to why they are being redirected.**

Subgoal #3: Review the individual balances of each linked account

Will Abi have formed this sub-goal as a step to their overall goal?

- YES
    - **Why?**
        - Yes because they have a specific goal in mind which is to review their account balances. They are unlikely to do something other than their task.
    - **Which facets are involved?**
        Motivations X
        Information Processing Style X
        Learning by Process vs. Tinkering
        Computer Self-Efficacy
        Attitude Toward Risk
        None of the above

Before Action #3: Abi scrolls down the dashboard to see a list of her accounts and their balances.

Will Abi do this?

- YES
    - **Why?**
        - It is very common to scroll on smart phone devices, so this will be intuitive for Abi.
    - **Which facets are involved?**
        Motivations
        Information Processing Style
        Learning by Process vs. Tinkering

Computer Self-Efficacy X
Attitude Toward Risk
None of the above

- **What in the UI helped/confused Abi in this step?**
  - **There is a detailed list of Abi's accounts, so they will know to scroll to view more of their accounts.**

After Action #3: Abi sees each account listed with its current balance clearly shown.

If Abi does this, will they know they did the right thing and are making progress toward their goal?

- YES
  - **Why?**
    - The account balances are clearly shown on the main page, so it is difficult to overlook.
  - **Which facets are involved?**

    Motivations X
    Information Processing Style X
    Learning by Process vs. Tinkering X
    Computer Self-Efficacy
    Attitude Toward Risk
    None of the above
  - **What in the UI helped/confused Abi in this step?**
    - **The ability to scroll down and see new accounts/numbers will be a clear indicator. Their only issue is if they don't attempt to scroll on the account section.**

Subgoal #4: Look at recent transactions to confirm there are no unexpected charges

Will Abi have formed this sub-goal as a step to their overall goal?

- YES
  - **Why?**
    - Yes because Abi wants to look at their account information and recent transactions. They have a specific task to complete.
  - **Which facets are involved?**

    Motivations X
    Information Processing Style
    Learning by Process vs. Tinkering
    Computer Self-Efficacy
    Attitude Toward Risk
    None of the above

Before Action #4: Abi taps on one of her accounts to view recent transactions.

Will Abi do this?

- YES
  - **Why?**
    - There is a specific button that says "Transactions". Abi does not tinker, so they will most certainly click this button.
  - **Which facets are involved?**

    Motivations X
    Information Processing Style
    Learning by Process vs. Tinkering X
    Computer Self-Efficacy
    Attitude Toward Risk
    None of the above
  - **What in the UI helped/confused Abi in this step?**
    - **Seeing the text "Transactions" helped.**

After Action #4: Abi sees a list of recent transactions and checks for anything unusual.

If Abi does this, will they know they did the right thing and are making progress toward their goal?

- YES
  - **Why?**
    - They will now see a complete list of their recent transactions. It gives the option to sort by most recent which is what they are looking for.
  - **Which facets are involved?**

    Motivations X
    Information Processing Style X
    Learning by Process vs. Tinkering
    Computer Self-Efficacy
    Attitude Toward Risk
    None of the above
  - **What in the UI helped/confused Abi in this step?**
    - **Being able to see the text "Sort by recent" made it clear that the transactions were the most recent.**

Debrief

1. **How many questions (forms) did you answer? (# of blue forms + # of light orange forms + # of dark orange forms)?**
   - = 12 questions/forms (denominator)

2. **How many of the questions (forms) in item 1 had EITHER a “no” or “maybe” answer?**
    - = 1 questions/forms (numerator 1)
3. **How many of the questions (forms) in item 2 had “no”/”maybe”s that were tied to facet(s)**
    - = 1 questions/forms (numerator 2)

Percentage of usability issues (numerator 1 / denominator)

- 8.3

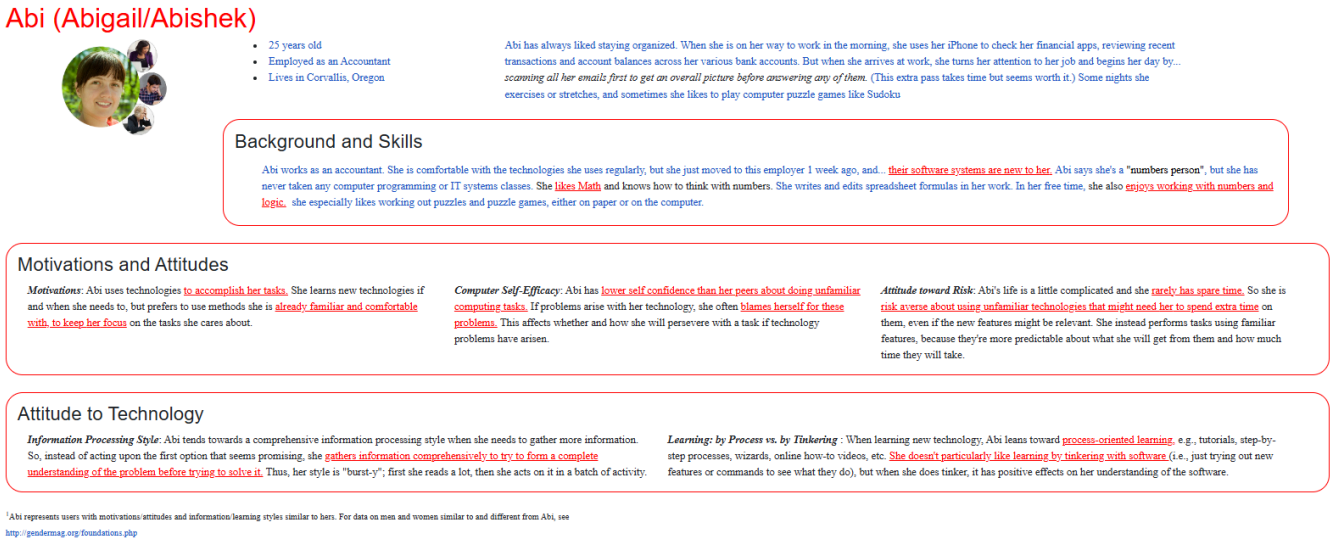
Percentage of cognitive inclusion issues (numerator 2 / denominator)

- 8.3

Comments

- Abi may get confused during the redirect to Plaid. Just add some more text to explain why the redirect is happening.
- Maybe add some sort of indicator that Abi can scroll through their bank accounts.

Full persona



Abi (Abigail/Abishek)
Abi Jones
25 years old
Employed as an Accountant
Lives in Corvallis, Oregon
Abi has always liked staying organized. When she is on her way to work in the morning, she uses her iPhone to check her financial apps, reviewing recent transactions and account balances across her various bank accounts. But when she arrives at work, she turns her attention to her job and begins her day by... scanning all her emails first to get an overall picture before answering any of them. (This extra pass takes time but seems worth it.) Some nights she exercises or stretches, and sometimes she likes to play computer puzzle games like Sudoku

Background and Skills
Abi works as an accountant. She is comfortable with the technologies she uses regularly, but she just moved to this employer 1 week ago, and... their software systems are new to her. Abi says she's a "numbers person", but she has never taken any computer programming or IT systems classes. she likes Math and knows how to think with numbers. She writes and edits spreadsheet formulas in her work. In her free time, she also enjoys working with numbers and logic. she especially likes working out puzzles and puzzle games, either on paper or on the computer.

Motivations and Attitudes
Motivations: Abi uses technologies to accomplish her tasks. she learns new technologies if and when she needs to, but prefers to use methods she is already familiar and comfortable with, to keep her focus on the tasks she cares about.
Computer Self-Efficacy: Abi has lower self confidence than her peers about doing unfamiliar computing tasks. If problems arise with her technology, she often blames herself for these problems. This affects whether and how she will persevere with a task if technology problems have arisen.
Attitude toward Risk: Abi's life is a little complicated and she rarely has spare time. So she is risk averse about using unfamiliar technologies that might need her to spend extra time on them, even if the new features might be relevant. she instead performs tasks using familiar features, because they're more predictable about what she will get from them and how much time they will take.

Attitude to Technology
Information Processing Style: Abi tends towards a comprehensive information processing style when she needs to gather more information. So, instead of acting upon the first option that seems promising, she gathers information comprehensively to try to form a complete understanding of the problem before trying to solve it. Thus, her style is "burst-y"; first she reads a lot, then she acts on it in a batch of activity.
Learning: by Process vs. by Tinkering : When learning new technology, Abi leans toward process-oriented learning, e.g., tutorials, step-by-step processes, wizards, online how-to videos, etc. she doesn't particularly like learning by tinkering with software (i.e., just trying out new features or commands to see what they do), but when she does tinker, it has positive effects on her understanding of the software.

Extra forms

Subgoal #NUMBER: SUBGOAL

Will Abi have formed this sub-goal as a step to their overall goal?

- YES/NO/MAYBE
  - **Why?**
    -
  - **Which facets are involved?**
    - Motivations
    - Information Processing Style
    - Learning by Process vs. Tinkering
    - Computer Self-Efficacy
    - Attitude Toward Risk
    - None of the above

Before Action #NUMBER (ACTION)

Will Abi do this?

- YES/NO/MAYBE
  - **Why?**
    -
  - **Which facets are involved?**
    - Motivations
    - Information Processing Style
    - Learning by Process vs. Tinkering
    - Computer Self-Efficacy
    - Attitude Toward Risk
    - None of the above
  - **What in the UI helped/confused Abi in this step?**
    -

After Action #NUMBER

If Abi does this, will they know they did the right thing and are making progress toward their goal?

- YES/NO/MAYBE
  - **Why?**
    -
  - **Which facets are involved?**
    - Motivations
    - Information Processing Style
    - Learning by Process vs. Tinkering
    - Computer Self-Efficacy
    - Attitude Toward Risk
    - None of the above
  - **What in the UI helped/confused Abi in this step?**
    -