Performance Analytic App   
Usability Testing High Level Findings

## Overall Experience

|  |  |
| --- | --- |
| 4/4 Test participants successfully completed the task flow to create, edit and navigate to an Analytics model using the UX design concept (internal & external test participants) | 5.625/7 Overall satisfaction rate about the UX design concept from test participants (1= 'Very dissatisfied', 7 = 'Very satisfied') |

Adjectives used to describe the experience performing tasks interacting with the UX Design Concept/clickable prototype from All 4 Test Participants

|  |
| --- |
| **Intuitive Clean** Less Clicks Easy **Clear Simple**  **Easy to use Easy to Navigate Self- Explanatory**  **(Note: Word Clouds of various sizes/color should go into this slot)** |

## Research Methods

* Remote (*in-situation*) usability testing was conducted on a convenience sample of 4 test participants (2 internal and 2 external) from 09/10/2020 – 10/14/2020.
* Participants were shown the Performance clickable prototype and instructed to perform three (3) tasks and provide feedback on their experience interacting with the UX design concept/clickable prototype and potential features via the think-aloud method.
* The Internal sessions lasted approximately 10 -15 minutes and were recorded via MS Team with both video and audio. The External session last 30 minutes.
* Following data collection, a content analysis was performed by watching recorded test sessions to extract user feedback in aggregate and identifying overarching themes.

## Test Participants

### Internal

|  |  |  |
| --- | --- | --- |
| Gender | Experience-Level | Location |
| Female | VP | NYC |
| Female | SME | Europe |

### External

|  |  |  |
| --- | --- | --- |
| Gender | Client/Organization | Location |
| Male |  |  |
| Male |  |  |
|  |  |  |

Overall Usability Findings Summary

* All 4 test participants successfully completed the tasks:
  + Add new Model
  + Edit Saved Model
  + Navigate to Home Page
* All 4 test participants were happy to be a part of the design process and to be given the ability to provide feedback.

Traffic Light Report Summary of Tasks Performed by Test Participants via UX Design Concept

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **P1**  (External) | **P2**  (External) | **P3**  (Internal) | **P4**  (Internal) | **Recommendations** |
| **Task 1:** Build A new Investment IRR Model |  |  |  |  | 1. Reduce Scrolling. 2. Add Option to select Chart Type on Performance Screen. 3. Add a default to have all options selected. 4. Reduce clicks 5. Add ability to view all options on one page 6. Add ability to compare models. |
| **Task 2:** Edit Saved Model |  |  |  |  | N/A |
| **Task 3:** Navigate to Home page |  |  |  |  | 1. Model’s drawer drop down menu should be on the home page. |
|  |  |  |  |  |  |
| **Success** |  |  |  |  |  |
| **Minor tweaks recommended** |  |  |  |  |  |
| **Failure** |  |  |  |  |  |

**Overall Satisfaction**

* On a scale of 1 - 7 (1= 'Very dissatisfied', 7 = 'Very satisfied'), the overall satisfaction rating for the UX design concept of 4 test participants is **5.625**
* The list of the adjectives that 4 test participants used to describe the experience of performing the tasks interacting with the UX design concept throughout the 30 minutes test sessions are:
  + Intuitive
  + Clean
  + Fewer Clicks
  + Easy
  + Easy to Use
  + Easy to Navigate
  + Simple
  + Self Explanatory
  + Simple
* Overall, all 4 test participants were able to complete the task with the proposed task flow.

**Details Insight Learned for Step 1 Screen**

* **4/4** test participants were immediately clear on how to select the IRR.

Recommendation:

* All options should be displayed on one page. The participant should not need to scroll to select the continue button.

**Details Insight Learned for Step 2 Screen**

* **4/4** participants understood what was required to select the desired entity and desired funds

Recommendation:

* All options should be displayed on one page. The participant should not need to scroll to select the continue button.
* All options should be selected by default to reduce clicks.

**Details Insight Learned for Step 3 Screen**

* **4/4** participants understood what was required to select the desired Investment filters.

Recommendation:

* All options should be selected by default to reduce clicks.

**Details Insight Learned for Step 4 Screen**

* **4/4** participants understood what was required to select the desired Investments

Recommendation:

* All options should be selected by default to reduce clicks.

**Details Insight Learned for Step 5 Screen**

* **2/4** participants easily understood what was required to select the Calculation parameters.
* **2/4** participants found the parameter screen confusing
  + As of date and Group by fields were displayed twice.

Recommendation:

* Move Chart type to the Performance page.

**Details and Insight of Learned for Review & Confirm Screen**

* **4/4** participants valued the importance of reviewing what information is being displayed on the Review & Confirm screen for reassurance.
* **4/4** participants were immediately clear that they can edit all the steps

Recommendation:

* No Recommendations

**Details and Insights of Saved Model View Screen**

* **4/4** participants were able to easily view ad access the Saved Model Results.

Recommendation:

* N/A

**Details and Insights of Home Screen**

* **4/4** participants were able to easily access the Home page.

Recommendation:

* Model’s drawer drop down menu should be on the home page.