

# Health Check Testing: Professionals

## Status Report and Recruitment Brainstorming

Design Thinking & User Research Team | October 2023



# Executive Summary

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## **Work completed**

- Scoping, research plan, test built in UserZoom
- Extensive recruiting efforts and documentation
- 4 tests (3 desktop, 1 mobile)

## **Why project was paused**

- Challenges reaching recruitment audiences efficiently & within approved pathways
- Project prioritization: DTUR took on other projects for FY24 Q1

## **Summary of findings**

- High task success rate – but few participants, especially on mobile
- Time-on-task longer on mobile, in some cases significantly

## **Recommendations**

- Time allotment for DTUR to restart project, in conjunction with broader recruiting investment
- Stakeholder support in clarifying external recruiting procedures through CFPB offices

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# Project Mechanics: Goals, Timeline, Challenges



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# Study Goals

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## **Overall Health Check Goals:**

- To establish baseline measurements for testing over time.
- To ensure the site remains usable as users' expectations and web technology change.
- To measure usability and discoverability for users.
- Observe design pattern functionality and catch any new issues.

## **Goals for Professional Audience:**

- Understand performance of patterns used on parts of site meant for professionals.
- Understand if professionals are able to complete the tasks we think they'll want to do on our site – and whether these tasks match what they actually want to do.

# Target Audiences

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## Two Target Groups:

1. Currently an **advocacy professional or researcher** who uses government information and has heard of the Consumer Financial Protection Bureau.
2. Currently **working for a business regulated by the CFPB** and has heard of the Consumer Financial Protection Bureau.

## Notes:

- These audiences were iteratively identified during the study set-up process.
- There was some concern from the beginning about feasibility of reaching these audiences and appropriateness of including participants who do not qualify for incentives (e.g. industry).

# Project History

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- Work began in July 2023, after consumer-focused health check testing was completed.
- Study built by previous contractor with guidance from [redacted] and DTUR team input, informed by Bureau priorities and previous tests.
  - Ability to successfully recruit from testing groups was a concern from the beginning (per comments on GitHub issue).
- Project only scheduled through end of Q4. Given recruitment challenges that slowed progress, team paused and is seeking guidance.

# Attempted Recruitment Avenues

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- **LinkedIn:** 2 posts (8/24 and 9/19), 6 total responses, 4 completions
- **UZ white glove service:** wouldn't recruit for incentive-ineligible groups. Said they could help with researcher and advocate audience.
- **RMR:** reached out to [redacted] re. contacting people in regulated industries. Does not appear we got answers.
- **OFIBL:** met with [redacted]. He seemed to indicate that ethics/legal would need to approve reaching out to trade groups. We decided to pursue other paths before asking for this.
- **Internal networking to find lists:**
  - Initial emails (after rec from [redacted]) to [redacted]
  - Redirected by a few people to OFIBL
  - Met w/ [redacted] about GovDelivery lists: perhaps an avenue for building an external pool, but not great for this use case or one-off requests in general.



# Recruitment Blockers

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- Lack of clarity on how/when it is acceptable to reach out to various audience groups, e.g. regulated industries, policy professionals, partisan groups, etc.
  - Difficulty getting clear answers from relevant offices within project timeframe
- Difficulty accessing CFPB networks of research, advocacy, industry, other professional groups that could facilitate recruitment from members
  - DTUR lack of own relationships with such groups (e.g. external pool)
- Low response rate from LinkedIn posts
- UZ white glove service is costly and may not be well-matched to our needs
- Contractor turnover and gap in UX lead position

# Participation Blockers

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- Participants unable or unwilling to download UserZoom extension on work computer.
- Incentives questions – less from participants, more about getting clarity on when/whether we can offer to incentivize participation.

# Possible Future Recruitment Avenues

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## **Revisiting previous avenues**

- Continuing to pursue RMR, OFIBL, GovDelivery lists
- UserZoom white glove service for researcher/advocacy audience
- Additional social media posts (talk to teams that have had success via LinkedIn)

## **Additional (new) avenues**

- Searching the Consumer Complaint Database, reaching out to professional complainants who meet relevant criteria
- Direct outreach, either via network contacts or cold calling
  - Think tanks, academic groups, policy organizations, etc. (question: rules around groups with an ideological/partisan perspective?)

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# Preliminary Findings



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# High-Level Results

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## Completed Tests

- 3 desktop, 1 mobile
- Recruited through LinkedIn
- Participant occupations: journalist, financial literacy advisor, public policy consultant/former lender, social policy researcher

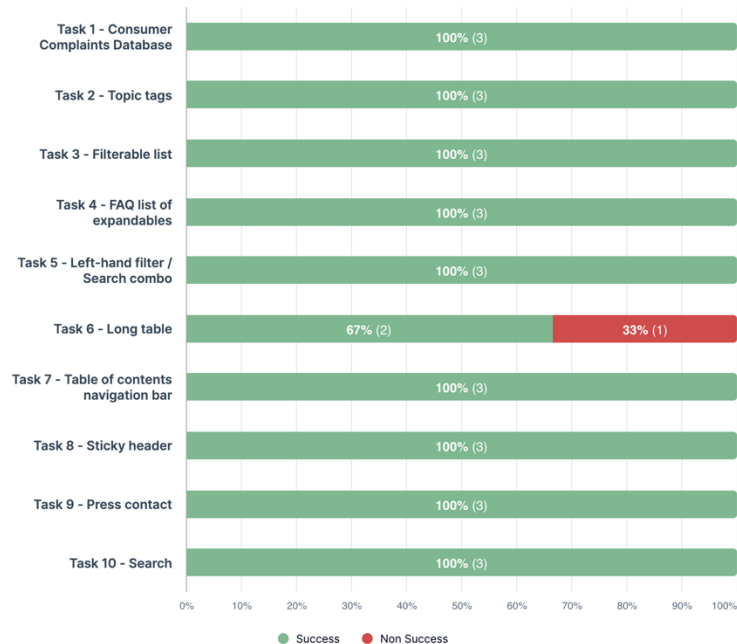
## Basic Findings

- High task success rate – but few participants, especially on mobile
- Time-on-task longer on mobile, in some cases significantly
- Results here are broad summaries – point toward places for in-depth analysis

# Key Metrics: Task Success

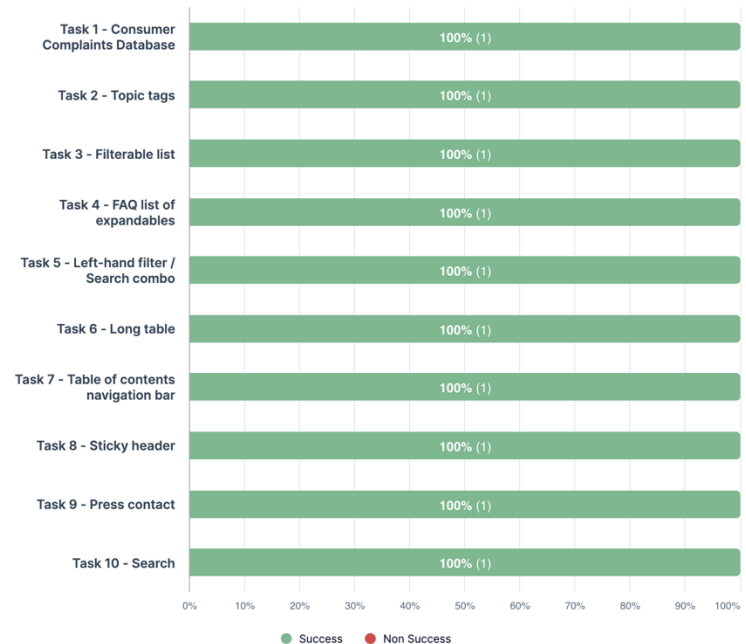
## Desktop (n=3)

Tasks Summary

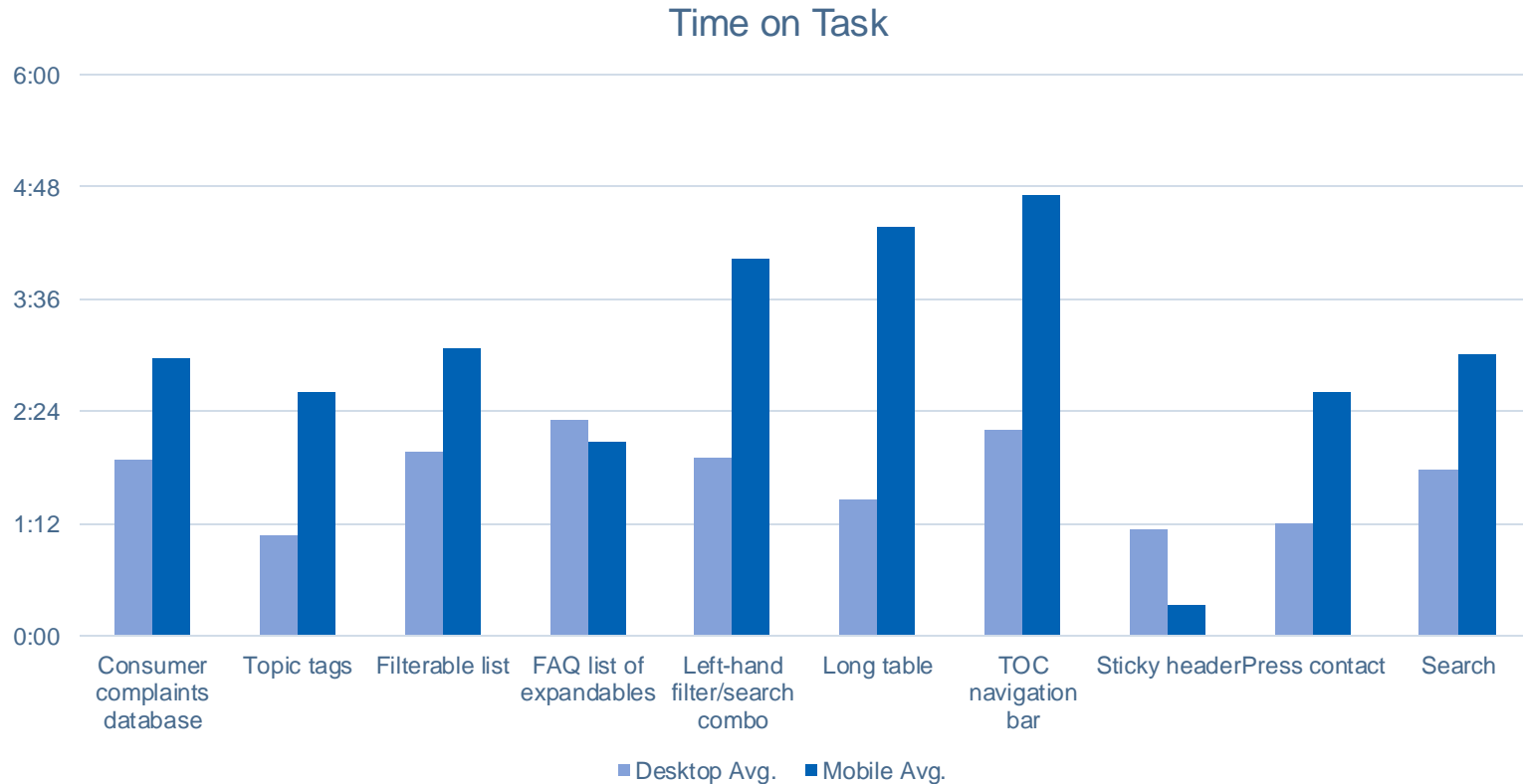


## Mobile (n=1)

Tasks Summary



# Key Metrics: Time on Task



# Metrics: Contextualization

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- Number of participants is very low, especially on mobile
- This is the first time we have tested professional-facing content on mobile
- Higher time-on-task for mobile is [not surprising](#), but worth investigating
  - Consumers: some tasks faster, others (more complex) took longer
- Last year's professionals testing: tasks much more general, less situational
  - Examples: look up current job openings, find who is the current Director



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# Questions for Further Analysis

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- Is there actually a usability problem with **long table data**, or was this just a one-off issue?
- Will **mobile task times** continue to be longer than desktop for other users? And how much does that matter? (Use case likely desktop-heavy)
- How would task success and overall user experience **vary between test audiences** (researchers/journalists and industry employees)?
- What other trends are we not seeing yet that we would want to **document and track in future years** of testing?

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# Recommendations & Next Steps



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# Operational Questions

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- Should resuming health check professionals project be added back to DTUR's quarterly roadmap? If so, when?
- Should broader clarification and investments related to recruitment (e.g. building relationships w/ Bureau groups, building an external recruiting pool) be added to DTUR's roadmap?
  - Which parts of this can the team do, and where might strategic assistance from stakeholders/D+D leaders be important?
- What is the proper set of steps for recruiting to different audiences? Can this procedure be documented?
- What are the DIG/Superhighway implications of any planned recruitment avenues?

# Recommended Next Steps

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- Include space for DTUR to work on broader recruitment activities and capacity-building (e.g. external pool) in an upcoming quarterly roadmap
  - Keep pursuing clarity on incentives question as part of this
- Stakeholder-level meeting(s) with OFIBL, RMR, and other key offices to determine best procedure for recruitment w/ their audiences
- If/when DTUR un-pauses health check for professionals, team will prioritize and pursue “future recruitment avenues” from slide above

# Possible Future Recruitment Avenues

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## **Additional (new) avenues**

- Searching the Consumer Complaint Database, reaching out to professional complainants who meet relevant criteria
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# Discussion/Questions



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# Appendix & Previous Materials



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# Methodology

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## Recruiting Methodology

- Social media (LinkedIn via OPA). Blurb posted asking for interested persons to email [CFPB\\_website@cfpb.gov](mailto:CFPB_website@cfpb.gov) → Content manager forwarded responses on to research team.
- Outreach through Bureau lists and networks. Attempts made through RMR, OFIBL, FinEd, Office of Stakeholder Management, all did not pan out (more below).

## Testing Methodology

- UserZoom, unmoderated usability test, goal of 9 desktop & 9 mobile participants.
- 30-minute sessions, \$80 incentives (except to people the CFPB regulates).
- English only – Spanish version of the site does not include professional-facing content.
- Participants need the ability to install UZ browser extension/app on device used for the test.



# Task Overview

Purpose	Task Instructions
<b>Consumer Complaints Database</b> – usability. Can people easily find info?	Without using search, find the last 3 months of complaints from people struggling to repay their student loans.
<b>Topic tags</b> – do people notice and understand them?	This article covers many subject areas, including junk fees. How would you find <b>similar content</b> about junk fees?
<b>Filterable lists:</b> discoverability – do they notice the filter?	‘Issue spotlights’ are a type of report published by the CFPB. Find an issue spotlight about debt collection published in 2022.
<b>FAQ expandables</b> – can people use expandable list?	There are <b>rules</b> about how often a debt collector can call a person about a particular debt. Do those rules also apply to how often they can send text messages?
Test clarity of relationship between <b>left-hand filter</b> and <b>search</b>	This database contains <b>product agreements</b> from financial institutions that offer prepaid cards. Does Bank of America have an active agreement for its government benefit cards?
Usability of <b>long table</b> , especially <b>horizontal scroll on mobile</b>	[Longer text explanation →] What’s the confidence interval for female consumers who had <b>difficulty paying a bill</b> at the beginning of the pandemic?
Navigation – do people <b>find table of contents</b> and navigate to answer?	The information here is about electric fund transfers. <b>Without using search, find</b> procedures for resolving transfer errors.
<b>Sticky header:</b> discoverability, use for navigation	Go to paragraph 1002.9(a)(3)(i)(B) of this regulation.
Discoverability of “ <b>Press Information</b> ” at bottom of press releases	You want to put this article on a financial news site you run. Find an email address you can use to ask for permission.
Discoverability and usability of <b>search</b> function	You work at a bank and need to send the CFPB some files about your small business loans. Use the search field in this guide to find out what format your files should be submitted in.



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**FROM 2022**

## Usability task success rate for professional audience

Professional Audience Tasks	Task Success Rate
Current Director of CFPB	0/7 (4 defaulted to search, which did not provide anticipated search results)
Policies CFBP is creating or implementing	5/7
What has CFPB done in the last month?	7/7 within first or second attempt (6/7 on first attempt)
How would you figure out if the CFPB publishes any data that would be useful or interesting to you?	6/7 within first or second attempt (5/7 on first attempt)
Information CFPB has released from their FOIA Office	0/7
Current job openings	7/7
Contacting someone at CFPB	4/4 (only 4 received this task)

# Executive Summary

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## WORK COMPLETED

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Extensive recruiting and documentation

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## WHY PROJECT WAS PAUSED

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Project prioritization: DTUR took on other projects for FY24 Q1

## SUMMARY OF FINDINGS

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## RECOMMENDATIONS

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Stakeholder support in clarifying external recruiting procedures through CFPB offices