

Usability Test Plan | Mortgage Re-Brand

Background & Business Objective

The rebrand team has applied the new US Bank brand to the mortgage experience on USBank.com. The team would like to understand users' thoughts and perceptions as well as the overall usability of the rebranded mortgage experience. Findings from this study will be used to further enhance the rebranded mortgage experience on USBank.com.

Research Objectives

General

- Determine if users are able to navigate to mortgage landing page from the USBank.com homepage.
- Determine if users are able to navigate the mortgage landing page to access calculators, loan options information, rate information, and the pre-qualify form.
- Identify if users are able to find, understand, and utilize available contact methods for mortgage help.

Affordability & Mortgage Payment Calculators

- Evaluate if users are able to successfully enter a purchase price and correctly determine their estimated monthly mortgage payment.
- Determine if users understand what the estimated payment assumes, includes, and doesn't include.
- Understand user satisfaction with the current affordability/mortgage calculator and determine if any functionality is missing or desired.

Rates Page

- Identify customers' perceptions around rates.

Loan Type Detail Pages

- Identify if users are able to understand content on various loan details page to gain a better understanding of the selected loan type.
- Learn if content meets users' expectations and if it provides them with enough information to move forward with mortgage process.

Prequalification

- Learn when customers expect to prequalify or apply for preapproval and what information they need before they are comfortable going through the prequalification/preapproval process.
- Evaluate if users understand what prequalification is, and if not, identify if they are able to learn about what prequalification is on USBank.com.
- Assess the general usability of field labels and form navigation within the prequalification flow.

Participant Requirements

Standard U.S. Bank user demographics will be screened. In addition to those questions, the following project-specific requirements include:

- Looking to purchase a new home in the next 6 months.
- First time home buyer (50% - Group) or repeat home buyers (50% - Group 2)



Number of Participants & Gratuity

- 16 participants will be compensated \$85 for 60 minutes of their time.
 - 12 standard participants
 - 6 on smartphone (50% group 1 / 50% group 2)
 - 6 on desktop (50% group 1 / 50% group 2)
 - 4 low-sight/blind users
 - 2 on smartphone
 - 2 on desktop

Methodology

- Usability testing will be conducted on UAT3 production website.
- Think aloud protocol will be used.
- Participants' past experiences and behaviors will be explored first through discovery questions.
- Participants will be given scenarios and tasks to complete.
- Follow-up questions will be asked to further explore users thoughts and perceptions.

Test Environment

- Lab Testing at USB

Technology Set-up

- (Rebrand): UAT3 testing

Evaluation

- Analysis of all participants will take place once all sessions are completed.
- Pass and fail criteria for tasks are measured on a 0-4 point scale.

Deliverables

- Test plan
- 48 hour top line summary
- Presentation of results

Tentative Project Schedule

- Kickoff Meeting: Jun. 23
- Planning: Jun: 23 – Jul. 7
- Testing: Jul. 12-13
- Topline: Jul. 14
- Analysis: Jul. 14-19
- Results: Jul. 20

Contact

For additional information regarding this test plan, please contact:

Jonathon Korum, UXDesign Researcher, UXDesign – Omnichannel Experience

Jonathon.korum@usbank.com