

Session Outline | Mortgage Rebrand Usability Study

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Test Dates: July 18 & 20-21, 2017

Activity	Duration (60 Minute Sessions)
Greeting & Background Questions <ul style="list-style-type: none"> • Verify own/rent status • Verify intent to purchase new home • Verify new vs repeat home buyer • Identify current place in home buying process • Identify if customer has talked to bank/broker about mortgage yet 	5 Minutes
Orientation <ul style="list-style-type: none"> • Brief participant on session flow and process 	2-3 Minutes
Current Journey Discover Questions <ul style="list-style-type: none"> • Learn about customer's process through exploring their current journey. • Learn if they have run into issues or questions throughout their current process and who has answered them. • Learn if they have contacted a bank or brokerage company about a mortgage yet. • Learn how they choose their bank/brokerage company. • Identify any pain points in current journey. 	10-15 Minutes
Scenarios & Tasks <ol style="list-style-type: none"> 1. Show me where you'd go first on U.S. Bank's website to start learning about what financing options U.S. Bank has to offer for your upcoming home purchase. 2. Demonstrate how you'd go about determining if U.S. Banks mortgage rates are competitive with other lenders. 3. Demonstrate how you'd determine the maximum amount of money you can spend on a new home using usbank.com 4. Now that you have determined how much you can afford, determine which type of home loan is best for you. 5. Now that you've decided on a _____ mortgage, determine what it would cost you each month if you bought a \$200,000 home. 6. What would be your first step if you were ready to move forward with U.S. Bank? 7. For today, let's say you'd like to start by getting pre-qualified for a loan. Demonstrate how you'd do this from usbank.com. 	30 minutes
Standard Usability Scale (SUS) <ul style="list-style-type: none"> • 10 standard usability questions to assess the overall usability of the experience. 	3 minutes
Wrap-Up Questions <ul style="list-style-type: none"> • Understand prefer contact method (if not discussed) • Gather any final thoughts or comments prior to ending the session. 	3-5 minutes