Exercise 1: Current experience

- This exercise gave us an overview of the banker's current experience so we could compare to it as they worked with the prototype
- We gave them a timeline
    - It covered the moment they met the customer at their office door until they began the new account application
- We also gave them some stickers of activities that we thought they might do during that time along with some blank ones
- They then placed the stickers in chronological order on the timeline adding ones we missed as needed
- Then they talked us through their experience

Customer comes to the bank

You greet the customer at your door

Shake hands

Invite into office + take seat

Intro self + wait t old

Ask what brings the customer into the branch

Purpose of account

Ask whether customer's have an account

Ask for a form of identification

Locate the customer in the system

Locate in hyp

Pull into Acc

Check customer's recent transactions/activity

Talk if issue

?

Confirm customer's personal information is accurate

Start the application for the new account

You start the new account application

? — what product or service meets your need? Can happen diff places
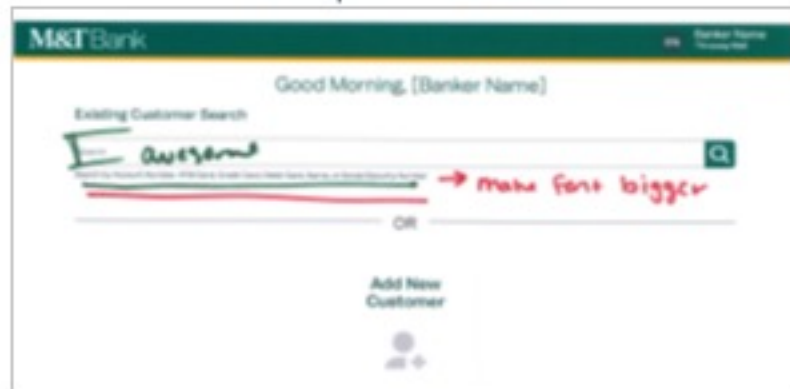
Exercise 2: Tested three scenarios

- We tested three* scenarios, with Kate Collins as the customer all the time:
  - **Joanna Wright:** Many search results returned
  - **Maggie (Magnolia) Miller**: Zero search results returned
  - **Mary Smith**: Very common name, to see if bankers would start with SSN, or some other unique identifier (many search results returned)
  - *In some cases we only ran two scenarios because we encountered other scenarios during the course of testing
- Having Kate play the customer allowed us to raise the fidelity of the scenarios
- It let the bankers show us how they would interact with the prototype & the customer during the session
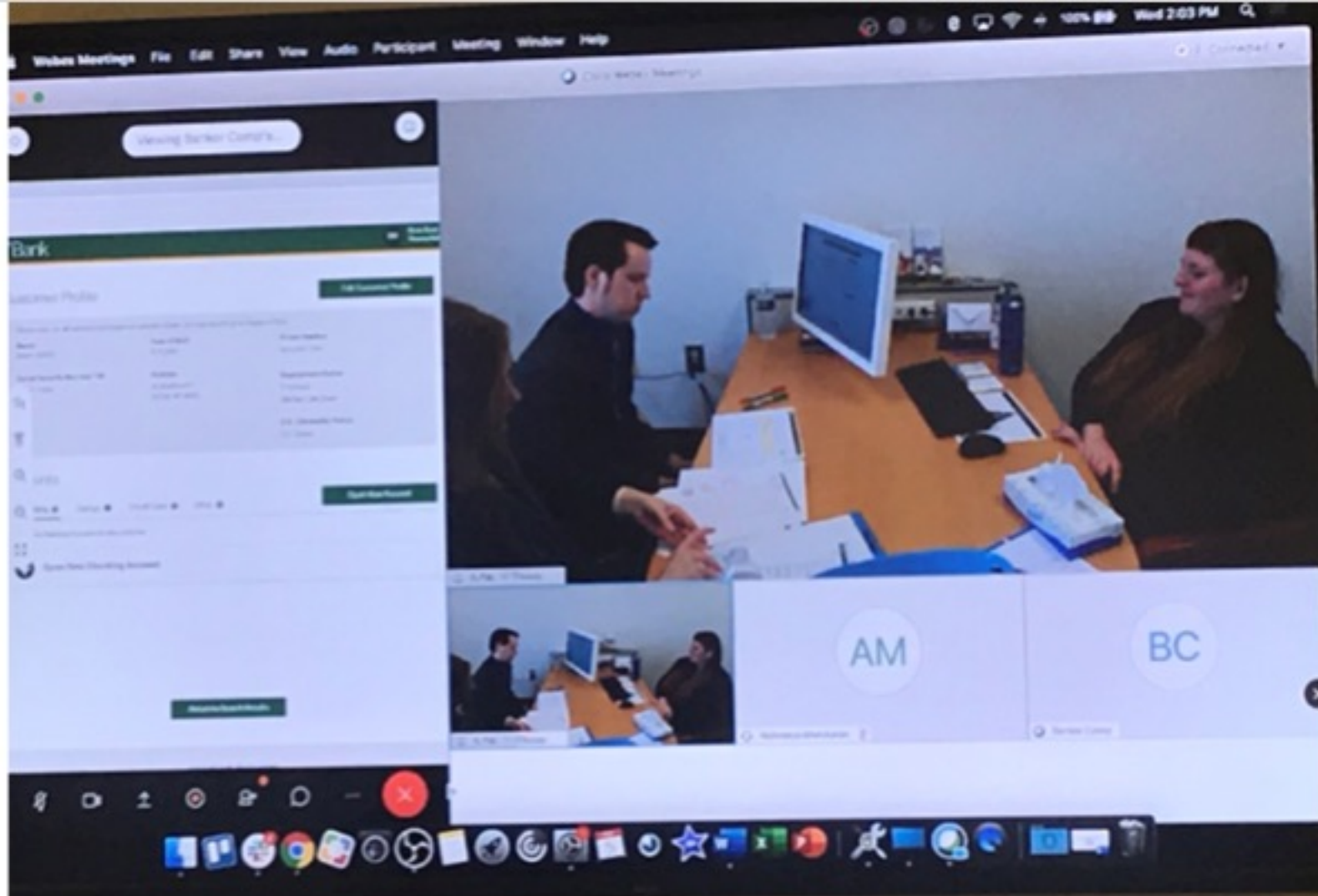
Exercise 3: Red/green pen

- After they worked with the prototype we provided the bankers with images of the screens & red & green sharpies

- They marked the things that worked well with the (green sharpie) or didn't work well (red sharpie) & told us about their experience

- This conversation helped us get a deeper understanding of how they experienced the prototype

- We made heat maps of all participants' composite markings for each screen & have included them in this report

Participant's raw data

Heat map of things that worked well
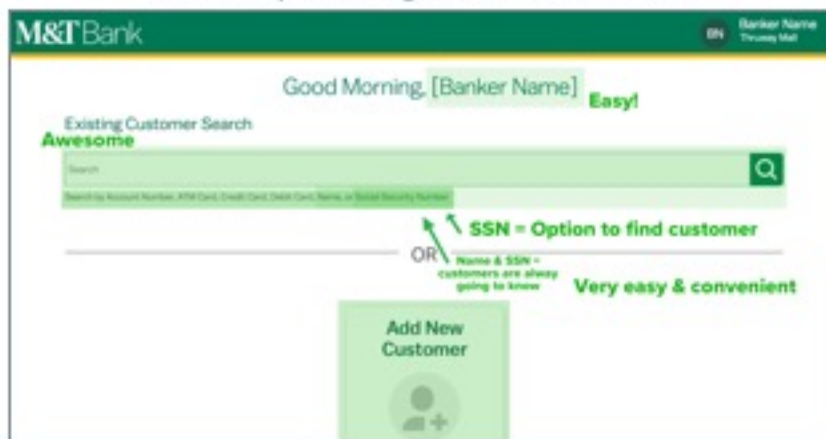
Exercise 4: Usability metrics

- We also captured various usability metrics
    - They included:
        - Completion success of the three scenarios
        - 1-7 scale ratings of four design principles that were used for the prototype
        - 1-7 ratings for ease of use and comparing the prototype to the current work environment
        - 2-3 things they liked about the prototype & that they would like us to improve
        - Words to describe their experience of the session

Backroom observations

We had a backroom set up to let observers watch the sessions and take notes for both days of testing