**Loyalty Customer Service App – Usability Testing**

**February 22, 2018**

This round of testing is to test with slightly higher fidelity than the first round (which was using paper prototypes) – this time using clickable wireframes. Still testing mostly for higher-level navigation hierarchy, and to determine whether the call center reps can find the areas in which specific details would be located, and that they can handle a call from start to finish with the application flow.

**Overview**

Concerns about this design being too different from the previous design, thereby causing too much disrupted, seem largely unfounded; the users are largely approving of the simplified flow.

One of the crucial concerns raised in this round of testing is the need to incorporate at least some of the participant details back in to the persistent header - most of these items were intentionally removed in the name of simplicity, but this testing uncovered reasons that some of this information needs to be accessible at all times.

The users also had some trouble figuring out how to discern between global notifications and program-specific notifications in this design, so there is a need to revisit how these are handled (including the use of the term “global”).

Finally, it was determined that a modal “one-and-done” approach for dispositioning of calls is not acceptable. First, it turns out that a single call can actually be dispositioned more than one time, contrary to initial research with supervisors and agents. Also, there is often a need to see certain participant details during the disposition process.

I’m going to be walking you through this session today.

Before we begin, I have some information for you, and I’m going to read it to make sure that I cover everything.

You probably already have a good idea of why we asked you here, but let me go over it again briefly. We’re asking people to try using a prototype of the Customer Service Application that we’re working on so we can see whether it works as intended. The session should take about an hour.

The first thing I want to make clear right away is that we’re testing the *application*, not you. You can’t do anything wrong here. In fact, this is probably the one place today where you don’t have to worry about making mistakes.

As you use the prototype, I’m going to ask you as much as possible to try to think out loud: to say what you’re looking at, what you’re trying to do, and what you’re thinking. This will be a big help to us.

Also, please don’t worry that you’re going to hurt our feelings. We’re doing this to improve the application, so we need to hear your honest reactions.

I am recording video and audio of this session, but the only people that will see it will be those working on this project.

**Warm-up Questions**

* What’s your occupation? What do you do all day?
* Roughly how many hours a week altogether—just a rough estimate— would you say you spend using the Internet, including Web browsing and email, at work and at home?
* What kinds of sites (work and personal) are you looking at when you browse the Web?
* Do you have any favorite Web sites?

**User 1 – Michelle Goforth (Customer Service)**

Find and authenticate a participant named John Doe in the Bank of America program, using Internal Account Number 123. (completed successfully)

(Once at detail): How many points does John have? (completed successfully)

In what area do you think you would find John’s address? Account status? Point history?

(Address was no problem, was a little unsure about account status (was looking for it in the static header, but since it wasn’t there, guessed it would be in Pax Details – which was wrong – was to be in Pax History), and didn’t know where to find point history at first, but then guessed (correctly) Pax History.)

Where would you go to access RewardSphere? No problem here

Where do you think you would find FAQ? T’s & C’s? Job Aids? (completed successfully)

Your call has been completed. How would you finish the process on this page? (completed successfully)

How many new notifications, specific to Bank of America, are there? (completed successfully)

Can you find where those are?

How many global notifications (non-program-specific) are there? Can you find them? (completed successfully)

Go through process again, and after you have selected a program and gone to the participant search area, change the program to HSBC. (completed successfully)

**Notes:**

* “Wasn’t very hard at all. Just need to get used to it.”
* Points history was hardest thing to figure out.
* Removing pax info from header may be a problem - was looking for some of this info
* Timing out is her biggest concern in the current system.

**User 2 – Sarah Primo (Customer Service)**

Find and authenticate a participant named John Doe in the Bank of America program, using Internal Account Number 123. (completed successfully)

(Once at detail): How many points does John have? (completed successfully)

In what area do you think you would find John’s address? Account status? Point history? (was looking for address in static header; same for account, thought it might be in pax detail; point history guessed correctly – pax history)

Where would you go to access RewardSphere? (completed successfully)

Where do you think you would find FAQ? T’s & C’s? Job Aids? (completed successfully)

Your call has been completed. How would you finish the process on this page? (completed successfully)

How many new notifications, specific to Bank of America, are there? (Went to Global Notifications instead of program-specific)

How many global notifications (non-program-specific) are there? Can you find them? (completed successfully)

Go through process again, and after you have selected a program and gone to the participant search area, change the program to HSBC. (completed successfully)

**Takeaways:**

* Much more simplified, just need to learn where everything is.
* No more functions that don’t actually do anything, like on LHQ.
* Was looking for pax info in the header, where it has been intentionally removed, for now - will likely have to add back in at least SOME of this info - more investigation needed
* Had trouble discerning between global and program-specific notifications
* BAML – Program Admin spreadsheet (possible future improvement) (maybe similar or same as auth users concept?)

**User 3 – Heather Shryock (Lead)**

Find and authenticate a participant named John Doe in the Bank of America program, using Internal Account Number 123. (completed successfully)

(Once at detail): How many points does John have? (completed successfully)

In what area do you think you would find John’s address? Account status? Point history?

(Thought Account Status would be in Pax Details; address and points were ok)

Where would you go to access RewardSphere? (completed successfully)

Where do you think you would find FAQ? T’s & C’s? Job Aids? (completed successfully)

Your call has been completed. How would you finish the process on this page? (Brought up the crucial point that after disposition, you may still need to do more with the account before ending the call.)

How many new notifications, specific to Bank of America, are there? (completed successfully)

Can you find where those are? (completed successfully)

How many global notifications (non-program-specific) are there? Can you find them? (completed successfully)

Go through process again, and after you have selected a program and gone to the participant search area, change the program to HSBC. (completed successfully)

**Takeaways:**

* Expected all pax crucial detail to be on EVERY page.
* **May need to see critical pax detail during disposition.**
* Can NOT have disposition automatically end the call. Must allow the rep to continue working in the account after setting a disposition, then ability to end call at that point.
* Escalations – need to be able to toggle back and forth between this and pax info
* “Global” may not be a good term for alerts not tied to a program.