



Irish Life



DIGITAL HUB

My Life Planner - Usability testing

Sprint 13 - June 11th – 24th 2020

Insights and findings

Testing cohort and methodology

- › 5 External test participants (3 males, 2 females)
- › 30 – 35 age range, 30 – 40min sessions.



Participant profile

- › **5/5** had at least 2 or more financial products
- › **4/5** already had their own home or were in the process of buying a home
- › **3/5** go through an online broker for all their financial research and purchases
- › **3/5** had taken out / purchased a financial product within the last 12 months

Participant objective:

- › To take the My Life Planner assessment and generate a report based of their financial situation

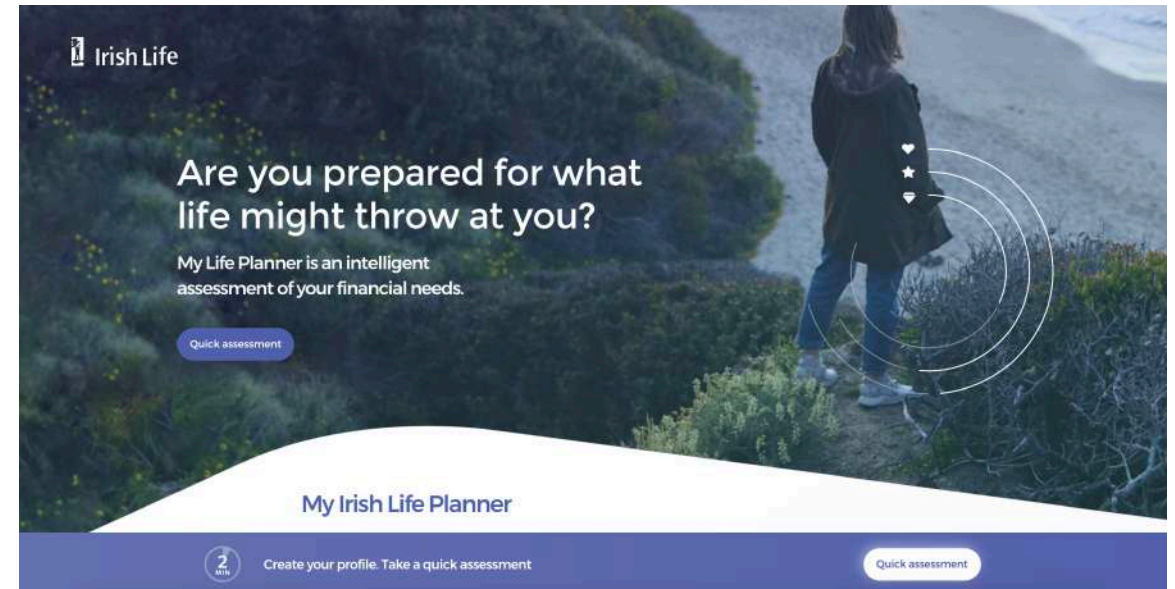
User Journey Feedback – Landing Page

Key take-aways

- › Overall impression was positive
- › 3/5 users in commented that the headlines worked in gaining their attention
- › 3/5 users didn't notice the sticky CTA (one of which actually commented that he would like a CTA that followed him as he scrolled down the page)
- › Some uncertainty around whether this would be for Irish Life customers only and also if it is a free or paid service

Suggested changes

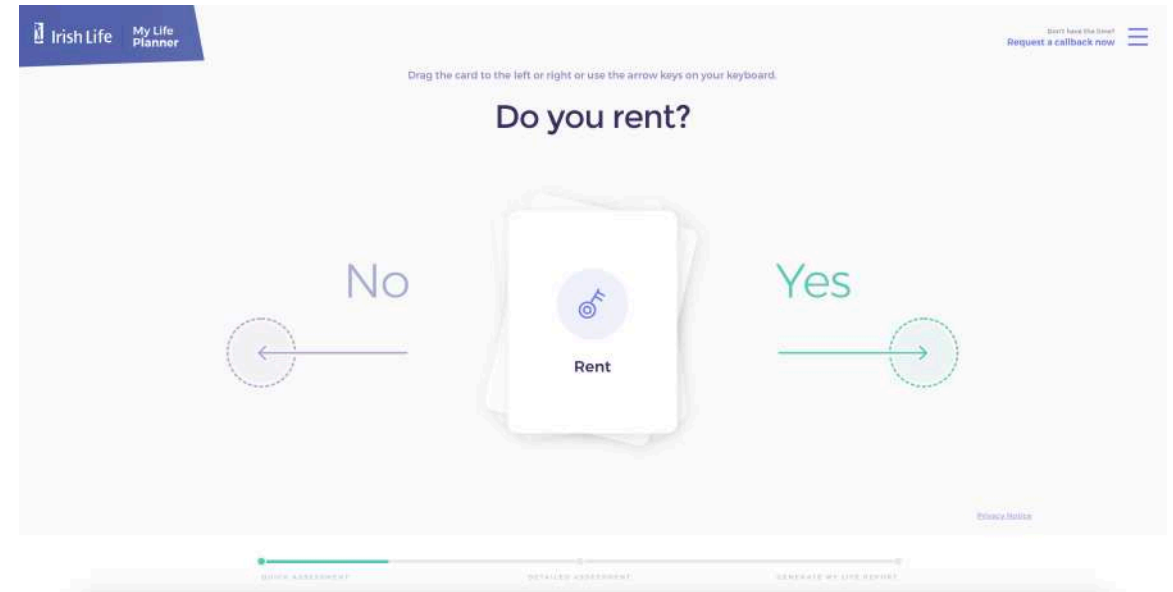
- › Improve contrast between main CTA and Background Image
- › Highlight the fact that the assessment is free
- › Make the sticky CTA more prominent / clearer



User Journey Feedback – Card Section

Key take-aways

- › 4/5 commented positively on the ease of use, design and interactivity of the card section
- › 3/5 hesitated / had some uncertainty on how to answer at least 1 of the card questions
- › All users commented that the progress bar at the bottom done a good job of letting them know how far along the journey they were to getting the report.



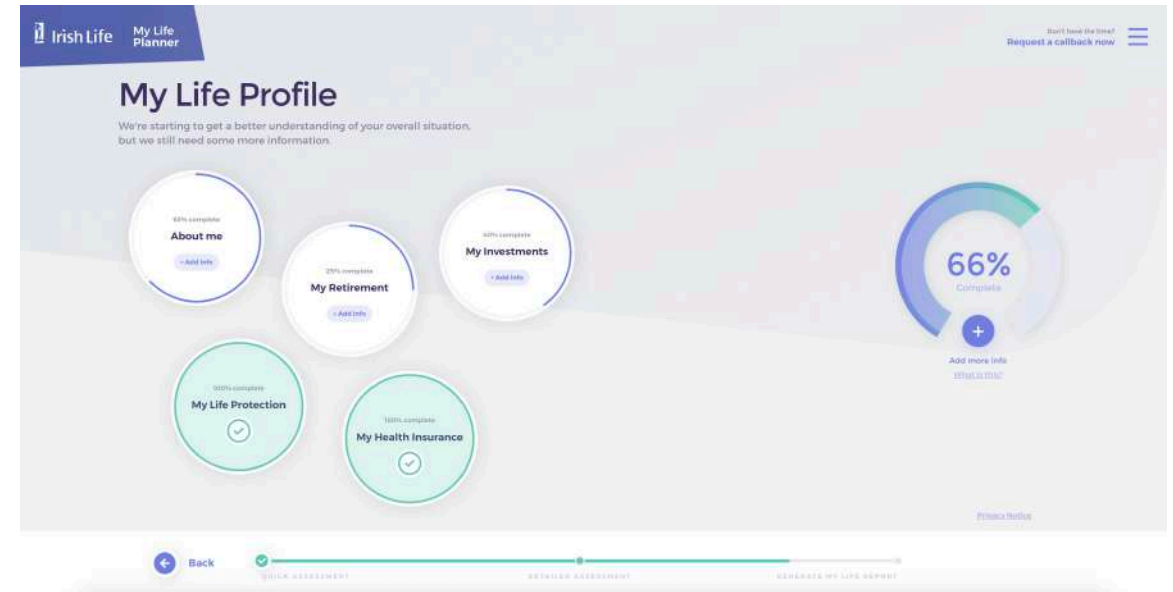
Suggested changes

- › Possible rephrasing of some questions
- › Possibility of adding a supplementary line of text under each question

User Journey Feedback – Dashboard

Key take-aways

- › 3/5 users expected some form of instant feedback after going through the card section “a visual, like a graph”.
- › 3/5 mentioned having a way to save and come back to finish completing their profile at a later stage either due to not having the time or to get / confirm information.
- › 2/5 users pointed out a lack of understanding for how to proceed when they initially landed on the dashboard



Suggested changes

- › Review the wording "2 minutes assessment" as users are expecting something straight after the cards.
- › Investigate possible ways to provide feedback on the dashboard
- › Look at signifiers to provide clearer direction (without removing the ability to explore freely)

Key take-aways

- > 4/5 left positive comments on the overall experience of taking and completing the assessment
- > Expectations at this stage were that they (the users) were going to get something “valuable” in the report based off the information they provided.

“I think it's great, I liked that I saw the progress I was making and I feel I'm going to get something valuable at the end of this now”



User Journey Feedback – Report

Key take-aways

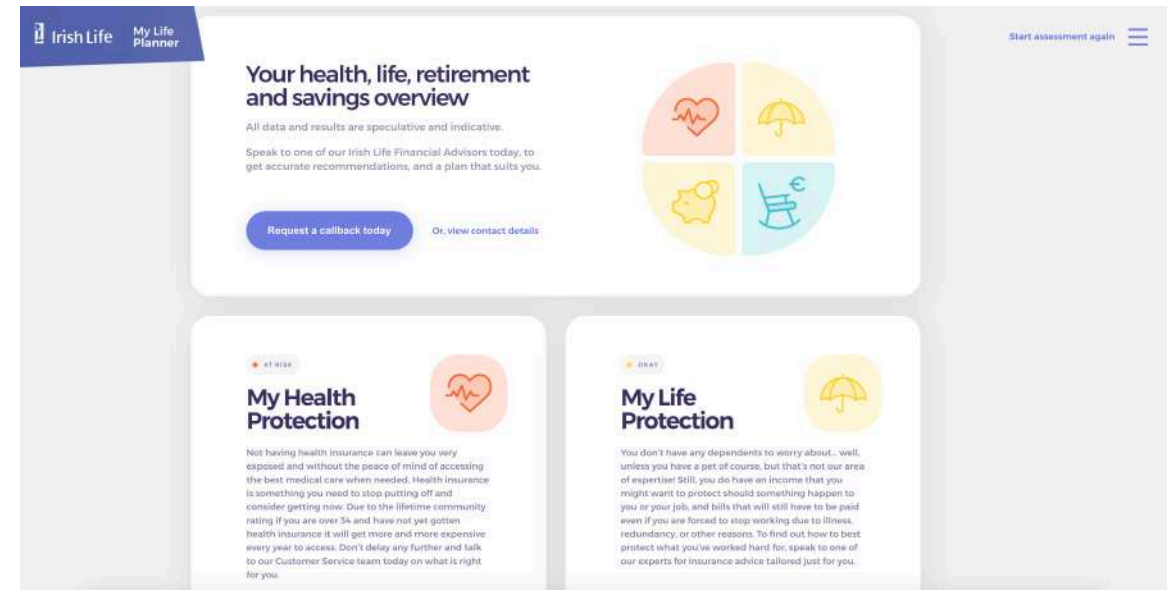
- > 4/5 commented negatively on the amount of text / blocks of text to read.

“I initially didn't even want to look at it, I thought it was going to be bad”

- > 3/5 mentioned the colour coding / okay – good scoring saying they wanted to see the full scale to know where they fit.
- > 4/5 wanted clearer next steps / tips / guides they could look further in to on how to improve their situation

“What are the next steps to getting to a better place financially, besides just saying you need to get it sorted give us a call”

- > 3/5 commented that it wasn't personal enough or that they expected more from the report



User Journey Feedback – Report

Suggested changes

- > Review the colour coding (do users associate the colours to good / bad) can we show the full scale worst - best.
- > Review the content, could we provide a scale,? An "ideal state" based on your age / salary ?
- > Review the formatting of the different blocks of information to make it easier to scan and digest.
- > Change the copy to introduce the idea of products the user does not have , might need (based off your information you may be interested in [product])
- > Review the content to avoid pointing out the obvious *“tell me something I don’t already know”*

