



## **SFE DCO – Canada Integrated Accounts**

User Feedback Session - Round 1 Moderation Guide

SFE Subject Matter Experts

15 Mar 2017

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## Document Details and Contact

<b>Project name</b>	SFE DCO – Canada Accounts
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## Version Control

Version	Status	Person	Date
V1	Complete	Kesha Watson	15 Mar 2017

**Introduction Script**

**MODERATOR:** Hi, \_\_\_\_\_. My name is \_\_\_\_\_, and I'm going to be walking you through today's session. Before we begin, I have some information for you, and I'm going to read it to make sure that I cover everything. We're asking people to try using a prototype of a new front-end tool that will allow you to complete a product application for a new customer.

**You have been provided with solutions to use with the prototype.** The solutions listed are the most direct paths (optimal paths) and will be used as guidelines to collect your feedback. Other solution paths may exist; however, those listed here represent the interaction we would like your feedback on today.

**We simply want to get your feedback on the application. There are no right or wrong answers during this session. The session should take about 40 minutes.** 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. If you have any questions as we go along, just ask them. I may not be able to answer them right away, since we're interested in how people do when they don't have someone sitting next to them to help. But if you still have any questions when we're done I'll try to answer them then.

Everything that you say today will remain anonymous. We collate the findings and feedback from all of the sessions that we conduct, at no point will you be identified.

**Do you have any questions so far? OK. Before we look at the prototype, I'd like to ask you just a few quick questions.**

**Collect Subject Information**

1. What is your title/role at the bank?
2. For how many years (or months) have you been with the bank?
3. Now, roughly how many hours a week altogether—just a ballpark estimate— would you say you spend using the Internet, including Web browsing and email, at work and at home?

**MODERATOR:** OK, great. We're done with the questions, and we can start looking at things. I am going to ask you to try some specific tasks. And again, as much as possible, it will help us if you can try to think out loud as you go along.

**Perform Task Scenarios using Test Data**

- Allow the user to proceed until you don't feel like it's producing any value or the user becomes very frustrated.
- Move through each task until time runs out.

**PROTOTYPE EVALUATION:**

This section outlines the structure of the session. It provides the wordings of the tasks that will be used and an indication of discussion topics that will be covered.

Items in blue text are instructions for the moderator and text in black are a guide to the wordings that will be used when addressing the participant.

The solutions listed are the most direct paths (optimal paths) and will be used as guidelines for scoring task completion. Other solution paths may exist; however, those listed here represent the desired interaction.

**Observation Notes:**

The following are observations that **will** be made by the moderator. The moderator will use these to ensure that important observations are captured throughout each session.

Record the participant’s navigation path when completing all tasks.

Note the types of information that participants require when completing tasks and their level of understanding/satisfaction with the information provided.

Note reactions to the layout, presentation and visual design.

Do the workflows presented match participant expectations? Note areas of confusion, frustration and drop out if applicable.

Is the terminology and language used appropriately?

Is terminology consistent throughout?

**Evaluation Assumptions:**

**Testing Assumption:** Two (2) Separate Test are performed. User Testing and Customer Experience testing. Data from each audience cannot be collected at the same time as they are from two separate perceptions.

**Evaluation Conditions:** Testing occurs in an environment where users will not be interrupted.

**Ecological Validity of Results:** The ecological validity of the results collected when testing the prototype may be slightly amiss. This study would benefit from being conducted in the actual test environment using a digital/UAT Testing environment.

## Task Scenarios and Test Data

### Task Scenario

1. Select a proposition
2. Complete Personal details
3. Complete Contact details
4. Complete Employment details
5. Complete Account usage
6. Complete Review
7. Complete Documents
8. Review Acknowledgement

### Test Data

#### HAPPY PATH SCENARIO

Proposition	Proposition: <b>Personal Account (Retail)</b>
Products	Choose: <b>Chequing &amp; Savings</b> Is this a new customer applying for a credit card only? <b>NO</b>
HSBC relationship	Do you have an existing relationship with HSBC? <b>NO</b>
<b>STEP 1 – PERSONAL DETAILS</b>	
Personal Information	Name: <b>Mr. Peter Lowenbrau Griffin</b> Have you ever had any other previous names or are you known by any other names? <b>NO</b> Date of birth: <b>15-04-1963</b> Country of birth: <b>Canada</b> Gender: <b>Male</b> Marital status: <b>Single</b>
Citizenship	Primary citizenship: <b>Canada</b> Country of permanent residence: <b>Canada</b>
Tax residency	Is the applicant a tax resident in Canada?: <b>YES</b> Social Insurance Number (SIN): <b>ABC123456</b> Is the applicant a United States (U.S.) person for U.S. tax purposes?: <b>NO</b> Is the applicant a tax resident in any countries other than Canada and the U.S?: <b>NO</b>
Identification	Primary identification type: <b>Canadian Driver's License</b> ID number: <b>SWV123456789</b> Province of issue: <b>Ontario</b>  Secondary identification type ID number: <b>XYZ123456789</b> Country of issue: <b>Canada</b>  Is the customer able to provide required ID?: <b>YES</b> Has the applicant's identity been verified in line with the required standards? <b>YES</b>
Potentially Vulnerable Customers (PVC)	Is the applicant a PVC? <b>NO</b>

About the applicant (Optional)	<p><b>This section is not covered in this session. Please advise user on purpose of section and have user move forward by clicking continue.</b></p> <p><b>This section is optional.</b> Relationship managers are encouraged to complete these details for Premier customers.</p>
<b>STEP 2 – CONTACT DETAILS</b>	
Phone and email	<p>Primary phone number HOME: <b>55-555-555-5555</b> Email Address: <b>peter.griffin@hsbc.com</b></p>
Address	<p>Country: <b>Canada</b> Address: <b>31 Spooner Street</b> <b>Quahog, Rhode Island 02901</b> <b>United States</b></p> <p>Home ownership status: <b>Owned outright</b> When did the applicant move to this address?: <b>01-2003</b> Is the <b>correspondence address</b> the same as the <b>residential address</b>?: <b>YES</b></p>
Language preferences	<p><b>Please advise user on default functionality of section.</b> Preferred language: <b>English</b></p>
Contact preferences	<p>Weekdays Preferred channel: <b>No preference</b></p> <p>Weekends Preferred channel: <b>No preference</b></p>
<b>STEP 3: EMPLOYMENT DETAILS</b>	
	<p><b>Note that the Credit Reporting option are now available and credit reporting information can be imported starting at this screen.</b></p>
Employment	<p>Employment status: <b>Employed</b> Employment role: <b>Employee</b> Employer/business name: <b>HSBC</b> Job Title: <b>Vice President</b> Business type/industry classification: <b>option</b> Occupation: <b>option</b></p> <p>Employer country: <b>Local country</b> Address: <b>10-123 1/2 MAIN STREET NW</b> <b>Toronto, Ontario, QC H3Z 2Y7</b></p> <p>Employment start date: <b>01-1998</b></p>
Income	<p>Income type: <b>Gross Salary</b> Income amount: <b>1000000</b> Period: <b>Yearly</b> Income confirmed: <b>Financial Statement</b></p>

**User  
Experience  
Questionnaire**

Now that we are done, I would like for you answer a few questions about your experience and ask me any questions you may have.

Your input will be invaluable in the development of the HSBC Front End Staff Customer Onboarding Application. We hope that you found it to be an interesting and enjoyable experience! Please tell me a bit more about your experience by answering these questions for me.

**On a scale of 1 to 5, 1 being you completely disagree – 5 being that you strongly agree, please provide your level of agreement to the following statements:**

1. I feel that I successfully completed all the tasks asked of me.
2. The tool was well organized and functions were easy to find.
3. I immediately understood the function of each item.
4. All of the functions I expected to find in the tool were present.
5. The buttons were well organized and easy to find.
6. I immediately understood the function of each button.

**Please answer the following questions:**

7. What do you find most frustrating about the prototype show to you today?
8. If you could change one thing about the prototype what would it be and why?
9. What is your overall impression of the prototype show to you today?
10. What are your thoughts about the current tools you are using to onboard or service new customers?