Summary of User Interviews

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Interview Setting:

Participants were interviewed over the phone for anywhere between 10 to 30 minutes to speak about the Admin Panel.

Questions used during the interview:

Below is a list of questions asked to draw out responses. Not all the questions were used to encourage a natural flow of dialogue.

How familiar are you with the admin panel?
How long have you used it for?
Are there any issues you're having with the admin panel?
Is there anything confusing about the the admin panel?
Do you have any problems with going through the process of taking a fresh lead to completion?
Can you think of any new features you'd like to see?
What do you like about the system?
Have you experienced any problems on the Dashboard page?
Have you experienced any problems on the Participants List?
Have you experienced any problems on the Search page?
Is there anything else you'd like to add?

Interview Recap:

participant 1.
VJ Allado
Team Lead, Member Care at Coast Capital Savings

Level of familiarity with the admin panel
very familiar, have used it since its launch.

Difficulties

- Searching for someone can be difficult when someone registers for a promotion with multiple family members with same address/phone number. In this case, I have to use the Participants list go to through the entire list to locate the member, and that can be time consuming.

- Sometimes the filter on the 'Participants List' malfunctions, and the list below does not refresh. It usually happens when I try to apply multiple filters. I usually have to go out of the screen and come back in to try again.

- A comment about the front-facing site, not the 'Admin Panel', there are 'business' and 'personal' promotions, and he can't tell which type of promotion the customer signed up for.

New Feature Suggestions

- When someone signs up, he/she has to pick a time to come in to the branch in person to open the account. It would be nice if they can select multiple date/times they are good with, or if they can select a window of time.

participant 2.
Gaz Garrett
Team Lead, Member Care at Coast Capital Savings

Level of familiarity with the admin panel
pretty familiar, but he only really uses the 'Participants List' page

Difficulties

- The list of Pending/Payroll Deposit (under Participants List) is outdated. Even when a 'lead' is completed, it never gets taken off this list. It would be nice if he has the ability to update this list so he can clean up the participants that were 'completed.'

New Feature Suggestions

- When someone signs up, he/she has to pick a time to come in to the branch in person to open the account. It would be nice if they can select multiple date/times they are good with, or if they can select a window of time.

- He needs to send an email to Central1 to let them know that a customer's payroll is connected to the account, so the customer can receive the $100 bonus. It would be nice if this process can somehow be automated so he doesn't have to send an email every time. For example, if he updates a customer as 'Payroll received', an automatic email can be triggered on his behalf to Central1, which could eliminate another Todo from his day.

- There were a few times when the account number has been entered incorrectly. (on edit view for an Unopened Participant). For it to be corrected, we have to go to Central1. It would be nice if they have the ability to fix mistakes like this. It's only happened about 4 times in 6 months, so it's not that big a deal, but it would still be nice to be able to fix mistakes quickly.

- There were a few times when the customer's name was incorrect, but that's the user error. When this happens, he would 'decline' so they can start a fresh one. It would also be nice to fix a mistake like this quickly on his side.

- If the 'Dashboard' could reflect numbers relevant to his branch, it could be helpful. Although, the numbers don't really matter to us.

How they use the admin panel

- He never uses the 'Participant Search', only uses the 'Participants List.'. He goes through the 'Not Opened' list, and he'll edit the participant and put in the account number and hit save.

- The 'Dashboard' page isn't particularly helpful to him, since he doesn't have to report on the number of leads or any other numbers on this page. He just worries about what's happening at his branch, and the numbers reflected on here is the overall number.

- Participants Search is pretty straight forward. I put in the first name and the last name, and a search result will be returned. If it comes up as blank, it means they haven't registered so he needs to create a new account.

What they like about the admin panel

- Pretty easy to process a normal sign up, he thinks that process is user-friendly and easy to navigate

participant 3.

Shelly Martin

Marketing Support Representative at Kootenay Savings

Level of familiarity with the admin panel
quite familiar with it, it's pretty simple to use.

Difficulties

- The 'Dashboard' is not up to date. All the numbers she sees on here are incorrect.

- The number of 'Leads' on 'Dashboard' is not relevant, since this is not a true reflection of qualified leads.

- The wording or phrases used on the 'Dashboard' are either misleading or confusing. She does not understand what 'Get Your Share 1.0 (Gift offer)' is actually referring to.

- When adding the account number for a new sign up, there's no mention of having to enter the 'account type' number on there, which she found confusing. It would be helpful to see a reminder make sure to enter the account type number along with the account number itself.

- The information on the Pending/Payroll Deposit screen is incorrect.

New Feature Suggestions

- When adding the account number for a new signup, having a Dropdown of 'Transit numbers' would be helpful, so she could quickly select the transit number.

- She would love to see a total dollar value of bonuses given out. That would be a great number she can share with the rest of her team to boost morale.

- She would like a field to enter miscellaneous notes for a customer.

- She would like to see a date for when they received the 'EFT Deposit', not just a yes or no.

participant 4.
Adrienne Bartlett
Money Advisor at G&F Financial Group

This participant was unavailable at the time of our call.