UX Recommendations

Credit Unions of BC - Get Your Share

version 3.0

Prepared by Angie Yoo

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A. Objective of the user interviews

The objective of the user interviews was to identify key areas for improvement on Get Your Share Admin Panel.

B. Methodology

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?

C. Key opportunity areas for improvement

1. Dashboard

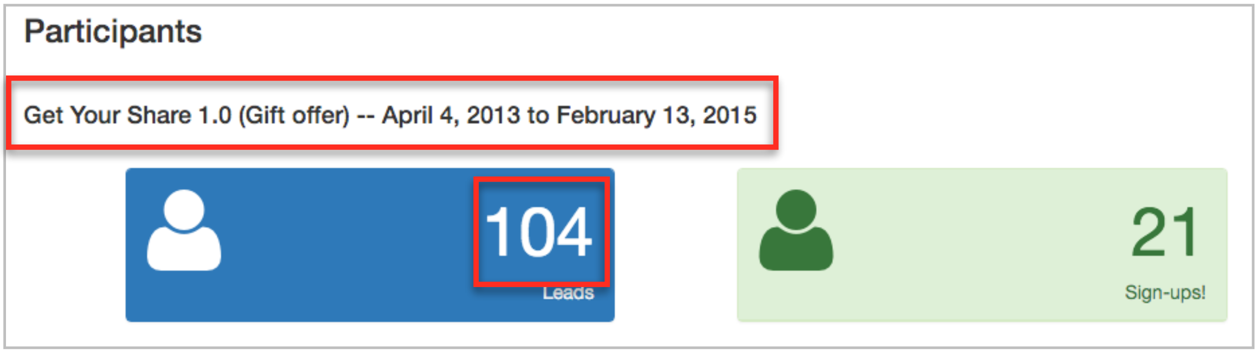

Figure 1. Numbers and titles are misleading

Customer Service Representatives (CSRs) are not using the dashboard as intended for the following reasons:

- Number of leads reflected on Dashboard does not represent the number of ‘qualified leads’, therefore they do not find this number to be useful
- The numbers reflected on the Dashboard is not relevant to their specific branch
- The number of leads, sign-ups are not accurate, often not up to date
- The campaign titles or headings (such as Programs or Central 1 Transfers) are unclear. They do not quite understand exactly what those are referring to.

2. Participants List

Participants List was the most used page. Four types of major issues were identified on this page and those were:

- Pending Payroll/Pension deposit list is not up to date. They do not have any control over this page to keep it up to date.
- Mistakes were made when entering details for customers, and they cannot go back and correct these mistakes without contacting Central1.

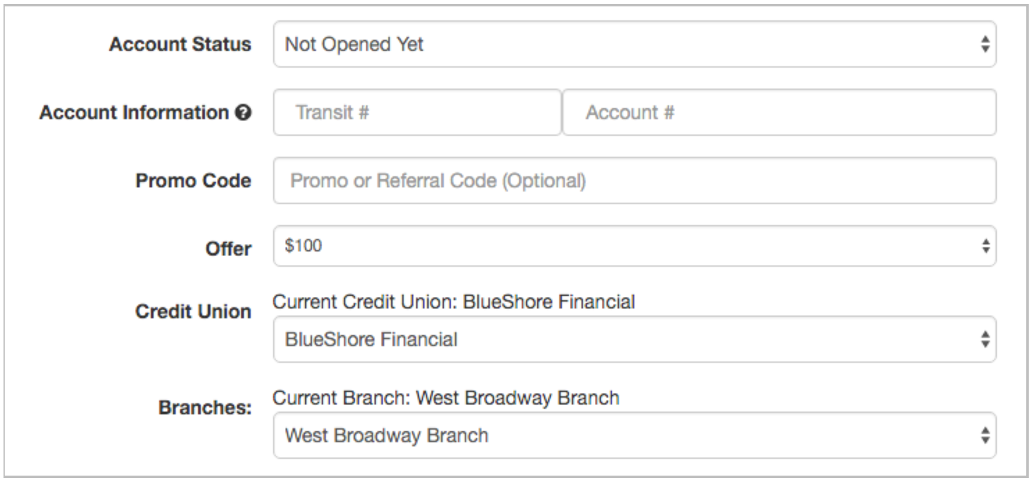

Figure 2. Mistakes were made while entering customer information on here

- Filters often malfunction, resulting in the list below to not respond, or refresh.
- Words/Phrases used on the Participants List are misleading or confusing.

Figure 3. Not exactly sure what the dates mean, nor the difference between referral/non-referral program types

3. Participant Search

- Searching for the customer can be difficult for special cases. When someone registers for a promotion with multiple family members with the same address/phone number. The search error message given seem to be confusing.

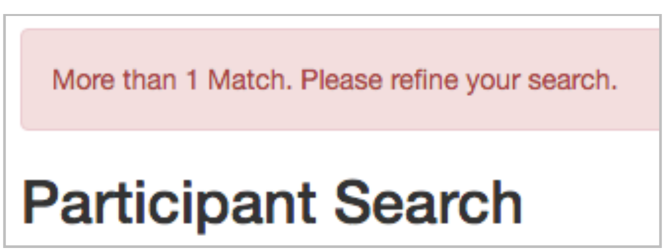

Figure 4. Error message not detailed enough to prompt them to try a different or more specific search query

D. Suggested Improvements

1. A new Dashboard/first page for different user groups

- Have separate role access between CSRs and Managers. Redesign the Dashboard to display appropriate information for different role types. Specify information displayed based on role type (CSR vs Managers) and specific branch, triggered by different login types.
- For CSRs, the information they would like to access upon logging in is the list of 'Participants' who are 'Not Opened Yet'. Instead of displaying number of 'leads' on the Dashboard page, give them the access to the 'Not Opened Yet' list immediately upon logging in. This list should be specific to the Credit Union/Branch they belong to. This page can be the first page they see upon logging in.
- Managers need the number of leads vs sign-ups for reporting purposes. Let them have access to up to date and accurate numbers upon logging in.

Question for C1: Can C1 provide details on what CU Managers need vs CU CSR's?

- Create a way for users to flag a lead as 'qualified'. A 'Lead' can progress from Prospecting -> Qualified -> Not Opened -> Pending Payroll/Pension Deposit -> Completed.

2. Find ways to minimize mistakes on Participant 'edit' form

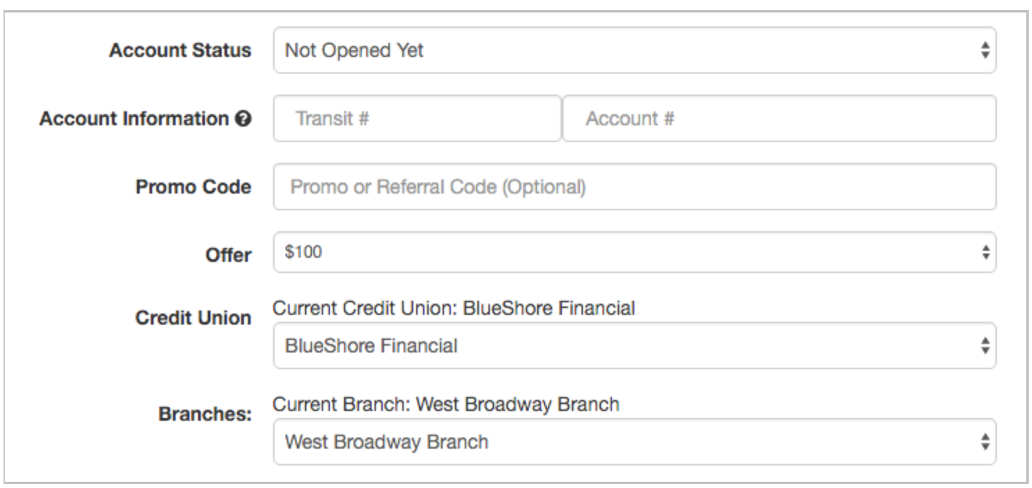

Figure 5. Finding ways to prevent mistakes when entering information on this form

- Having a dropdown list for Transit # instead of having an open form field would minimize mistakes.

Question for C1: Can C1 provide us with transit numbers per credit union (one transit number per row)

- Find out how account numbers are formulated, and check for algorithms to see if there's a way to identify incorrect account numbers. When a CSR enters an incorrect account number, display the error message, and prevent saving.

Question for C1: Can C1 identify what requirements there are for account numbers to help with verification?

- If appropriate, have a separate field for entering 'account type'. If not, have a reminder to enter account type with the account number.
- A simple change like increasing the margins between the form fields, and increasing the size of the form fields could increase the time taken to fill out this form, which could help prevent mistakes. An Accordion page layout could help, as well as having a 'preview' step so they can review the information. However, I recommend looking into what kind of mistakes are frequently made before proposing a layout style change.

3. Insert tool tips to explain vocabulary , be consistent with the language/phrases being used

- Few comments were made on terminology used within the Dashboard being confusing. A short-term solution is to add tool-tips beside words that could confuse users. Upon hovering the tool-tip icon, users can see a detailed explanation of the word.

- A long-term solution would be to conduct a focus group to determine vocabulary the majority of CSRs will instinctively understand, and use those on the Dashboard. Also, once these terms are determined, give out training material to new CSRs so they can familiarize themselves with the terms.

4. Few ways to automate/improve efficiency

- Implement an automated email feature which is triggered once a customer's payroll has been received
- Let customers pick multiple times for coming into the branch in person to open accounts (This is for front-end registration.)

Appendix - Recap of User Interviews

Interview Summary

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 an 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.

Level of familiarity with the admin panel
very familiar, have accessed it almost weekly over the past year

Difficulties

- Often we have to go back and update the referral or add direct deposit, and we cannot do that through the Admin Panel, we have to email. Would be nice if we can notify using the Admin Panel

New Feature Suggestions

- I would like if there was a place to ask questions or update the members into after the fact through the GYS site instead of going through email

What they like about the admin panel

- Easy to search interface, easy to understand, excellent graphics
- I like that the “Member is in branch” was added to avoid extra emails to the member.