

Expert Crowd Testing Helps Top Credit Union Continually Improve Digital User Experience



Challenge

The Client wanted to achieve best-in-class digital user experiences.

They needed to make more informed and agile UX decisions for future improvements.



Solution

Qualitest analyzed exact requirements and produced a comprehensive proof of concept.

We planned, scripted and set up UX testing, crowd-sourced users then executed and analysed responses.



Results

The final UX report was of high value to multiple internal stakeholder groups.

The credit union's proactive new UX posture has enabled much more agile rollouts.



Client overview

The Client is a top credit union in the US. They provide a full suite of banking solutions to their members, including mortgages, loans, business services and wealth management all wrapped into a robust digital banking experience.

The financial services industry has seen strong consumer demand for more state-of-the-art digital solutions like mobile- and online banking software, enhanced money-transfer options and security integrations that enable financial transactions to be completed digitally.

Because much of this change is consumer driven, the Client has become laser-focused on their end users when designing and developing new digital solutions. They recognize that they must understand customers' preferences early in their development cycle if they want to deploy quickly, minimize disruption and dissatisfaction, and feel confident that their planned changes will be well-received.

Proactive CX strategy needed to delight omnichannel banking customers

The Client was converting to a new digital banking solution and wanted to ensure that the new solution's design and functionality better meets their end-users' needs compared to the incumbent solution.

While this conversion project was the short-term focus, this credit union was also considering a long-term plan for user experience (UX). They wanted an ongoing testing program that would enable them to proactively manage UX, versus reacting to member feedback after new feature rollouts. They had developed a usability testing plan

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but did not have a platform or resources to execute on it for their short or long-term needs.

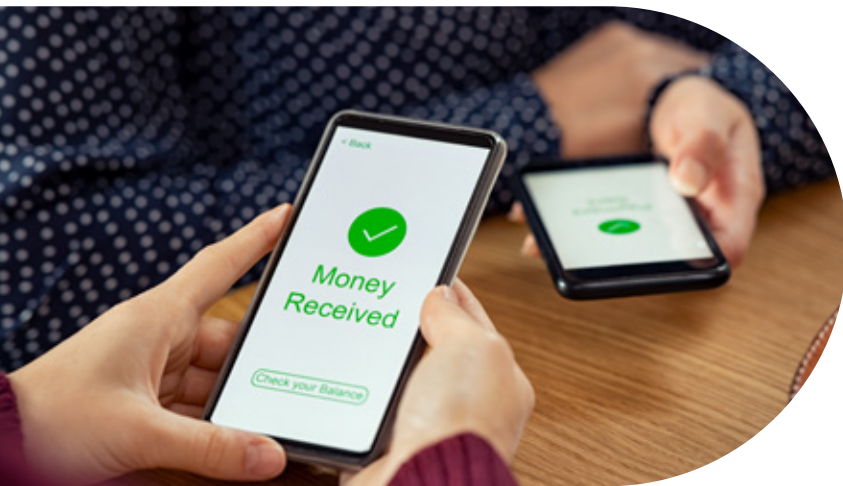
Proof of concept drives improved UX posture

Qualitest recommended a proof of concept (PoC) comparing existing and future digital banking solution platforms. The objective was to perform the same tasks on both platforms without indicating to the users which application was current and which one was new. This approach removed end-user bias and ensured a fair comparison.

Qualitest worked with the credit union to define user personas and ensured that the users being picked for the task were an accurate representation of users typically engaging with their platform.

Qualitest created a test that could be executed on both digital banking platforms. VPN was used to allow access to the platform that was not deployed. The users repeated the same set of instructions on both platforms and recorded their screens while navigating both applications. The users then answered a post-test survey to compare Site A to Site B on key aspects of UX. Qualitest took steps to ensure the benchmark was done fairly across both sites and supported the test process end to end.

Qualitest's work included test planning, setup and scripting; participant recruitment, execution and analysis, and the production of a detailed UX report.



Key benefits

- The credit union was now able to plan, develop and deploy with confidence, knowing that their digital enhancements meet and exceed their members' expectations.
- Gaps in usability could now be addressed proactively, minimizing risk and increasing overall user satisfaction.
- The Client gained far more insight into real user opinions before planned releases.
- The final UX report was of high value to multiple, internal stakeholder groups.
- The new proactive UX posture has enabled agile feature rollouts, smarter customer communications, informed staff training, product development and business intelligence.

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