



Enrollment App Updates

Usability Test Findings/Recommendations
& Screen Updates

By Julietta Musica, Product Manager

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User test was conducted over a 3 week span with 5 Axos employees as the participants.

> High Level Findings

- All participants said they liked the simple and clean look of the enrollment app.
- All participants were able to get through the application process quickly.
- Of the 5 applications created:
 - > 2 were **Auto Approved**
 - > 1 went **under review** – (due to participant’s name)
 - > 1 was put **On Hold/Credit Freeze** and then Declined (due to entering a deceased SSN)
 - > 1 was **Auto Declined** (due to wrong ID expiration date error)

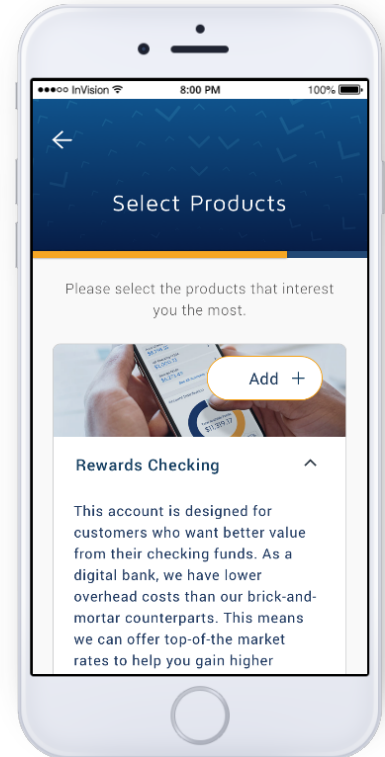
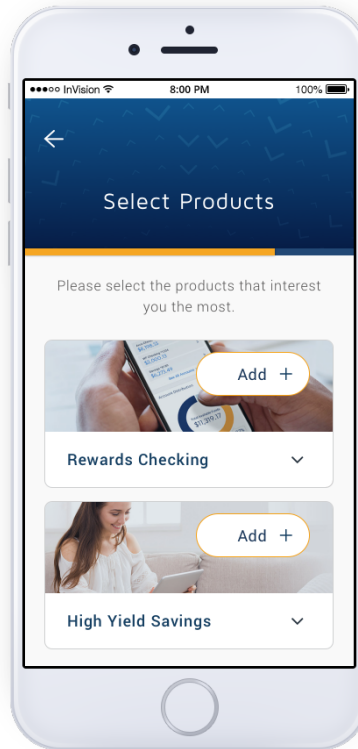
> The test identified only a few minor problems including:

- The **lack of information** on the product page
- The **inability to change/choose name**. Issues also found **with** name concatenation.
- The **lack of visibility** of controls (Enable Touch ID/No Thanks).
- **Payveris’ inability to recognized bank**. 100% of all users who were served the option to fund their account had issues with the external transfers section. Payveris failed to recognized their bank and users had to do micro deposits.

App Screen Updates

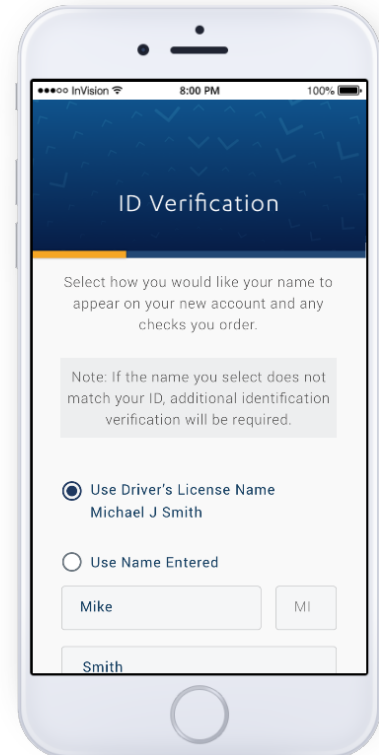
Product Screen – 3 out of 5 users said they needed more information.

- > **Findings:** 3 out of 5 users felt there was not enough product content for them to make an informed decision. The design also was confusing: selected vs. non selected.
- > **Recommendation:** a redesign of the product screen to provide clarity of product choice and additional product information.
- > **View Prototype:**
<https://bofi.invisionapp.com/share/4FP12T4QUG2>
- > **PBI:** TBC



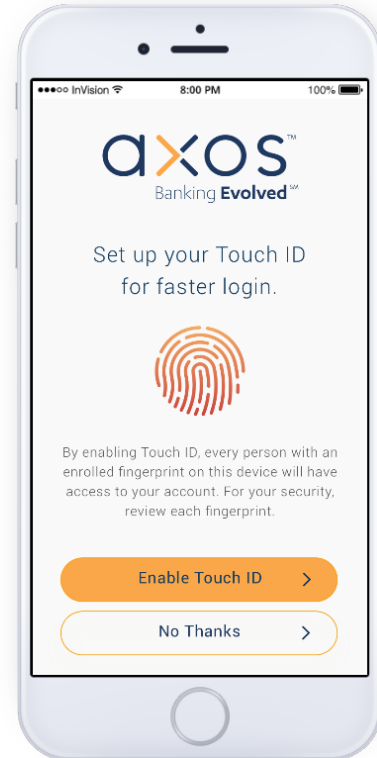
Name Verification Screen – 2 out of 5 users would like to edit their name so that it would appear correct on their account, checks and debit card.

- > **Findings:** DMV Barcode removes space and hyphenation from name. The result would be checks/debit cards with concatenated name.
- > **Recommendation:** Design a name verification screen for users to select and edit their name.
- > **View Prototype:**
<https://bofi.invisionapp.com/share/GFP4M3YKPDC>
- > **PBI:**
<https://bofaz.visualstudio.com/OnLine%20Banking/workitems/edit/218145>



Touch ID Screen – 100% of users “loved” this feature.

- > **Findings:** 3 out of 5 users thought the thumb print icon would activate the touch ID when pressed. The current design had the button positioned below the fold.
- > **Recommendation:** A redesign of the Touch ID screen to bring CTAs above the fold.
- > **View design:**
<https://bofi.invisionapp.com/share/SQOYH3ZUY76>
- > **PBI:** TBC



App Screen Updates

Create Account – Provide option for SMS for future nurturing.

- > **View Prototype:** <https://bofi.invisionapp.com/share/4FP12T4OUG2>
- > **PBI:** https://bofaz.visualstudio.com/OnLine%20Banking/_workitems/edit/218710

