

Usability Test Findings

Overview

I conducted a usability test with 6 participants in total; 2 males and 3 females ranging from ages 21 to 43. This was done through 3 moderated in-person and 3 moderated remote think aloud usability tests through Zoom and Skype. I had each participant navigate through Zinvest's new website to observe how they complete each task and discover any pain points. During each task, the participants would walk me through their process and tell me what they are thinking aloud. I recorded all the tests to document my findings and transcribe them later. From what I've seen, the task seemed straightforward for most participants with a few errors here and there.

Test Completion Rate

All users completed 100% of their tasks. Most of the tasks given were straightforward, but there were some tasks that participants had trouble on, but figured it out eventually.

Usability Test Tasks

Age:

Gender:

Occupation:

Task #1: Learn more about the company

Task #2: Find the list of securities you can invest in

Task #3: Locate information about how Zinvest protects your account

Task #4: Find how to earn free stocks

Task #5: Submit a request to Zinvest

Task #6: Find what documents are needed to open an account in the U.S.

Task #7: Locate the price for options trading

How does our website compare to others?

How distracted were you during the process?

Participant 1

Age: 24

Gender: Female

Occupation: UX Designer

Task #1: Learn more about the company

- **"I would go to the navigation bar and press on company"**
 - Clicks on company in navigation
- **"I would just scroll down and read about the company"**
 - Scrolls through Company's page
- **"Reading about the background of the company and the company's team. Seeing pictures of the company, joining the team, so I guess jobs and hiring. Students specialist, so some educational programs... I don't know where I would find information on how the app would work though"**

Difficulty

Rating: 2

- **"I would kind of expect to see 'About Us' or something, that's what I usually see to learn more about the company. It wasn't that hard to find this, it's just kind of different."**
 - Suggests to see "About Us", "About Zinvest", "Our Company", and "Learn About Our Company"

Valuable

- **"This is pretty valuable to me because I'm planning on investing like financial stuff and it's like my money, which is important to have trust in the company that I want to put my money in. It is important, but for me I think I would like to see... for me, an important factor is if I can trust the company and what the company could provide for me, but i'm not really sure if that really stood out to me because it's just more background information about the company, but yeah."**
- Rating: 3
 - **"Because I'm not very interested in learning about the company, but more about what the company provides for me."**

Questions, Concerns, Feedback:

N/A

- Clicks on Logo to go back to homepage

Task #2: Find the list of securities you can invest in

- **"Okay, I will try to see what you guys have here (goes to product section in nav.bar)"**
 - Clicks on securities"
 - Scrolls through the Securities Page

- **“I get the definition of securities and the options that Zinvest provides: Stocks, ETFs, Options, and scrolling down, FAQs. I think this was the point that I was curious about, which is right here. (the FAQ). I think this page is straightforward. I think the first thing that I would want to know right after this was how much it will cost, which I found right under the FAQ.”**

Difficulty

- Rating: 1

Valuable

- Rating: 5
- **“This task is very valuable because I want to know what the company provides to see if I'm interested in seeing what kind of securities I want to invest in.”**

Questions, Concerns, Feedback:

“I wish there was a separate section for the pricing, because I think that's something important to me. The second thing was how much you guys charge right after seeing the lists of options.”

Task #3: Locate information about how Zinvest protects your account

- **“So I would expect to see it under learn”**
 - Expects to see security information in the 'Learn' section
 - Attempts to click on 'Learn'
- **“I'm scrolling down to see about account protection, to see if there's a page for that information.”**
 - Finds the security section she's supposed to be looking for

Difficulty

Rating: 3

- **“Because I just kept scrolling down to find it, I wasn't exactly sure where it was. At first I thought it was looking for something similar to this (account protection section under 'Why Zinvest') it's not clickable, so I was just scrolling down to see if there's any information on that.**

Valuable

Rating: 5

- **“Valuable, very valuable”**

Questions, Concerns, Feedback:

N/A

Task #4: Find how to earn free stocks

- **“Actually I found that section before on the home page.”**
 - Scrolls through home page to the 'Earn Free Stocks' section

- Clicks on 'Learn More'

Difficulty

Rating: 1

- **"I saw that section before"**

Valuable

Rating: 4

- **"Because I were to share it with friends, i would want to know how to do it, but I'm not sure if I would share it with my friends or not until I download the app."**

Questions, Concerns, Feedback:

- **"That section (rewards) was huge on the front page that's how i remembered where it was. I would say that it might be a little too big, but it was very easy to spot though with the illustrations and everything, where it was."**

Task #5: Submit a request to Zinvest

- **"I would go to support and then contact us, to see if there's any contact information"**
 - Clicks on support > Contact Us
- **"I see mail, and ask questions through this. Oh, there's a submit a request, so yeah, I would probably use this form to fill out and submit my question."**
 - Successfully submitted her request

Difficulty

Rating: 1

- **"pretty easy"**

Valuable

Rating: 2

- **"Pretty valuable because I could have questions and it would be good for me to find a place to submit my questions easily. I don't usually ask questions or submit questions for things"**

Questions, Concerns, Feedback:

N/A

Task #6: Find what documents are needed to open an account in the U.S.

- **"Maybe i'll scroll down to see which documents I need"**
 - Scrolls through home page
- **"I'm trying to look for a section that would show what I need... Maybe download Zinvest?"**
 - Attempts to click Zinvest*
 - Clicks on Fees & Pricing*
- **"I'm not sure where to find it, I would go to Get Started"**

- Me: "Why's that?"
- **"If I click on get started, the next screen will show me what information or documents I need to sign up or get an account."**
 - Scrolls through the homepage
- **"I'm not sure where to find the documents for the accounts, I feel like it would be... I don't know, did I skip over it?"**
 - Goes back to Securities*
- **"I don't think it would be here though... either that, I think it would be on the homepage"**
- Scrolls through the homepage again
- **"I feel like it would be a section to create an account or what I need to create an account, but I don't know where that section is. I thought I would be in product, but that's like more information on what kind of products/services you guys provide, but not exactly how to create an account. I would assume it'll be on the home page, but I'm not sure."**
 - Assumes the document info. Would be in the get started button
- **"Maybe to learn, but I don't know what learning would be. If I had to choose, it would be under products, but then I feel like these three sections (Securities, Fees & Pricing, and Download Zinvest) would provide me with that information."**
 - Goes back to the securities page
- **"I went back to the securities page because I couldn't find it in the home page, and this would be the next place that I would expect to find it, but I feel like it would be in the FAQ somewhere on this page or the homepage, but on this page, I don't see anything related to documents I need to create an account."**
 - Goes back to homepage
- **"I will go back to the homepage and look in here."**
 - Scrolls through the homepage
- **"I feel like it's more information about investing, but not something related to creating an account. I feel like i'm not sure where it would be"**
 - Clicks on FAQ under support
- **"Ohhh, there's an FAQ section"**
- **"I went to Support and FAQ, I found it right here, but I think I kept looking for it in the other FAQ sections like on the homepage, but then it wasn't there."**
 - Successfully found the page

Difficulty

Rating: 5

- **"I felt like I kept expecting it to be on a FAQ section, but I kept looking for it on the homepage without knowing that there is a separate section for the FAQ. Oh, and the thing is, I kept thinking that it would be in the FAQ section, so in the front (homepage), like the homepage, I thought I could press "View All Questions", but it wasn't clickable, so i wouldn't think it would be in another section. But I would assume it would be in the FAQ section. So I wanted to click this button, but I didn't think that there would be a FAQ section here."**

Valuable

Rating: 3

- **"I think it is pretty valuable because I need to prepare the documents to know how I can start an account, so yeah, It is pretty valuable."**
 - Would usually not go into the FAQ, but would download the app and figure it out during the account opening process
- **"I would see what documents I would need, if i was making an account."**
- **"not as valuable, because i feel like, If i can do it within an app, I don't need to check what documents I need since you can just do it when you sign up."**

Task #7: Locate the price for options trading

- **"Options trading... okay, I would think I would scroll down to find a section for options trading, actually I'll go to products and in the securities to see if there's options trading."**
 - Clicks on Securities
- **"I'll try to click into here"**
 - Attempts to click on Options*
- **"Options trading... If not, I think since this isn't clickable or there's not information on pricing for this, I would go to the homepage and see if there's any detailed information in regards to options trading."**
 - Goes back to the homepage*
 - Clicks on View All Securities
- **"I think it would be on this page somewhere...Maybe i'll see it under FAQ"**
 - Clicks on FAQ*
- **"U.S. Options Trading..."**
 - Finds Options Trading section in the FAQ
- **"Hmm... it's not clickable... Fees and Charges... is this not clickable either...? I think it would be in here or prices... Fees & prices..."**
 - Seems confused to find where the pricing would be
 - Analyzes the FAQ for pricing
- **"I'm trying to think about where else I could find that information"**
 - Clicks on Products and goes to Fees & Pricing
- **"Oh right here"**
 - Finds Options Trading Pricing
- **"I feel so dumb, haha"**

Difficulty

Rating: 4

- **"Kind of difficult, because I wasn't thinking about that (nav bar), Fees & Pricing. I kept looking for it in the FAQ section... but I feel like it was there too. This would be the other way to do it, probably, under fees."**

Valuable

- Rating: 1
- **“Not that valuable because i don’t know what options trading is”**

Questions, Concern, Feedback on overall website?

N/A

How does our website compare to others?

- **“Felt it was very colorful and fun compared to other financial websites. Typically finance websites look a bit boring, I think. But the one you guys made has lots of icons and illustrations. Other than that, functional wise, pretty much the same.”**

How distracted were you during the process?

- **“Not that distracted.”**

Participant 2

Age: 27

Gender: Female

Occupation: UX Designer

Task #1: Learn more about the company

- **“First thing I would do is to look through the homepage because that always highlights the main thing about the app, this is cool...”**
 - Scrolls through the home page
- **“If I want to go in-depth, I would go into the Company”**
 - Clicks on Company in nav bar
- **“Our mission is to make investing easier for everyone, from east to West... Our story, our team.”**
 - Observing the Company's page

Difficulty

Rating: 1

Valuable

Rating: 5

- **“I think it would be super valuable because I would want to know how Zinvest set themselves apart and why I should download it and how I would get the most value out of it.”**

Questions, Concern, Feedback

N/A

Task #2: Find the list of securities you can invest in

- **“So my first thought would be to go in products”**
 - Clicks on Product in nav bar and goes into securities
- **“Perfect securities, What are the different products we have, what are securities... that's nice to have, and the type of securities you could invest in.”**

Difficulty

Rating: 1

- **“It was also very straightforward to me Like I didn't have to second guess anything and I assume that I was going to find securities under products”**

Valuable

Rating: 5

- **“I think it is valuable because it goes into the specifics and it tells me what securities are and the specific types, so I think it's valuable**

Questions, Concern, Feedback

N/A

Task #3: Locate information about how Zinvest protects your account

- **“I would assume that it would be under... I think it would be under products or support, but I'll look under support for now.”**
 - Observes the support drop down
 - Clicks on Product Dropdown
- **“I would guess Download Zinvest, okay, well that's not it then”**
 - Clicks on Download Zinvest*
- **“So let's see... maybe in the FAQ”**
 - Observes all the questions in FAQ
- **“Oh account security... this would it, right? I would click view all”**
 - Clicks on Company*
- **“Is it in privacy?”**
 - Attempts to click Privacy*
- **“What's to learn?”**
 - Clicks on Fees & Pricing*
- **“Okay... having trouble obviously... This is how Zinvest keeps accounts secure”**
 - Explores the Company page
- **“It doesn't seem like it's in here... Does it have to do with the licensed and qualifications?”**
 - Clicks on Contact Us*
- **“I mean I have looked at it, okay, i'm going to cross it off, it's not in company...”**
 - Goes through all the pages in the prototype, except the homepage
- **“I'm so lost”**
 - Explores the company's page
 - Explores the FAQ page
 - Explores the Fees & Pricing Page
- **“I'm confused about where it is, do I have to read harder? At this point I'm clicking randomly because I'm not sure where it is.”**
 - Explores the FAQ page
- **“Okay, well I was already in here.”**
 - Clicks randomly in the footer
 - Goes to the homepage
- **Omg, don't tell me it's on the home page...”**
 - Scrolls through homepage
 - Finds the section on how Zinvest protects your account
- **“Okay, I know the issue, I'm an idiot. I assumed the product was the home page when I saw the homepage before.”**

Difficulty

Rating: 5

- **“It was very difficult just because there’s so many things and I just didn’t think that I would click on the logo. For me, I don’t know if it applies to anyone else, but for me, I think having a ‘home’ would’ve helped because I did not like click on the logo to go home because I was not familiar with the website yet. So I thought, “oh, one of these (nav bar) is already the home”**

Valuable

Rating: 4

- **“I think it is valuable because people need to know their money is safe. If I were to download Zinvest, I would need to know that information too.”**

Questions, Concern, Feedback

- **“Just having a ‘Home’ in the nav might be nice, but you can see in your future testing”**

Task #4: Find how to earn free stocks

- **“So I would guess that I would need to invite my friends in order to get those free stocks. I would check on the homepage first”**
 - Scrolls through the homepage
 - Finds The Free stock section in the homepage
- **“Yeah, it would be here and I would learn more”**
 - Clicks on Learn More
 - Explore the Earn Free Stock page

Difficulty

Rating: 1

“Now that I know how to get to the homepage. I would assume it would be on the homepage because you would want promotional stuff there and deals. So yeah.”

Valuable

Rating: 3

“I guess it depends. For me, I get really lazy to invite people for free things, but if I saw it, it may intrigue me to save money. I would make someone I’m close with to do it with me, but I wouldn’t say it’s a 5 because referring to people I get lazy, so I would give it a 3.”

Questions, Concern, Feedback

N/A

Task #5: Submit a request to Zinvest

- **“So support, contact us”**
 - Goes to support and clicks on Contact Us
- **“Go in here... and type in my questions and then submit.”**

Difficulty

Rating: 1

“ Very straightforward for sure because support is in the nav.”

Valuable

Rating:4

“A lot of the information is already provided on the website, so this is really only if I can’t find exactly what I’m looking for.”

Questions, Concern, Feedback

N/A

Task #6: Find what documents are needed to open an account in the U.S.

- **“Okay, I know I saw this information before, and i don’t think it’s in the homepage, but i’m going to look anyway.”**
 - Scrolls through the homepage
- **“So right now, I’m scrolling through the homepage because I don’t want to miss it. I think the homepage is usually more high-level, so I’m going to go into more specifics... maybe download.”**
 - Clicks on Download Zinvest*
- **“I’m guessing it’s in the FAQs”**
 - Clicks on FAQs
 - Clicks on the question
- **“Right here, U.S.”**

Difficulty

Rating: 3

- **“ I think I’d try to look everywhere else and if I can’t find something then I would go into FAQs. So I would just give it a 3.”**

Valuable

Rating: 5

- **“I think this task is super valuable, so I’d give it a 5 because you’d need this information in order to use the APP in the U.S. I guess, so I think it’s really important.”**

Questions, Concern, Feedback

- **“I think it would be nice to have it in Download Zinvests because I feel like this type of information you will still need is nice to have. I don’t know, I don’t really like to go into FAQs since it’s like a last resort thing, but it would be nice to have it there (Download Zinvest Tab).**

Task #7: Locate the price for options trading

- **“Okay, so i would go into fees pricing”**
 - Clicks on Fees & Pricing in the nav bar
- **“And then I’d go down to Options trading... and here are the fees.”**

Difficulty

Rating: 1

- **"It was easy."**

Valuable

Rating: 5

- **"Honestly, I don't know what options trading is, but I feel like if I were to want to use this app, I would want to know all the fees that I'm paying, so I would give this a 5."**

How does our website compare to others?

- **"For other websites, I think you go really in-depth, which is nice, and a beginner could start leaning on here. I think it looks very modern, so I like that. I feel like a lot of websites look outdated. But yeah, I like that everything was straightforward except for that one task because I was just dumb. I didn't think so. Other thing I like is that for stocks, people usually think it's boring, but this is a playful site kinda, it makes it more fun and lively and not dry."**

How distracted were you during the process?

- **"Honestly, I wanted to do a task as efficiently as possible. When I was stuck on that one task, I felt like that's when I got the most distracted because I was like... 'what is this?'. I was observing every little thing because I was trying to find where it was. I don't think it would be a common issue, it was just a me thing."**
- **"For the company thing, I think that made me confused. I kept thinking, 'Oh, everything is going to be on company, so I kept coming back to it. But yeah, because I was so engrossed in that task, I didn't think I wasn't on the homepage. Honestly, yeah, I don't know what I was thinking. I thought that if I click on a product, and I don't click on any of these (drop down) it's going to go to the homepage, but obviously it just opens this (drop down). I feel like because this (drop down) to open, I would be like 'okay, I'll click one of these?'"**
 - **She was confused by other tabs thinking that it was the homepage**

Participant 3

Age: 43

Gender: Male

Occupation: Customer Representative

Task #1: Learn more about the company

- **“Well there’s company and learning, so I want to learn about the company. So i’ll click on company”**
 - Clicks on Company
- **“Well I see the story, and the team... okay.”**

Difficulty

Rating: 1

- **“Pretty good, you’d want to see what’s up with the company and their information,so... it looks like it has a lot of information about the company, so it’s good.”**

Valuable

Rating: 4

Questions, Concerns, Feedback

N/A

Task #2: Find the list of securities you can invest in

- Clicks on Learn*
- **“So I would look for the stocks then...”**
 - Scrolls down the homepage to see what else is on there
- **“Oh, what can I invest in... there we go... and view all securities.”**
 - Clicks on View All Securities
- **“It’s teaching me which one I can invest in that the website has”**

Difficulty

Rating: 1

- **“Just because it was easy clicking off the main page. I didn’t think to go into products since I was exploring the site, but products would work too.”**

Valuable

Rating: 4

- **“Pretty valuable because I know different investing apps usually do certain things, like certain types of stocks... this one has ETFs and IPOs... so yeah.”**

Questions, Concerns, Feedback

N/A

Task #3: Locate information about how Zinvest protects your account

- **"I'm just going to scroll through the main page again to see if I see anything about the security, okay, account protection, here we go."**
 - Scrolls through the homepage
- **"I'm scrolling down more... and okay, it's insured and everything. I do see the information about the security"**

Difficulty

Rating: 1

- **"I just scrolled down"**

Valuable

Rating: 3

- **"I mean it's always something to be aware of on the website, but once you look at it once, you don't really need more security."**

Questions, Concerns, Feedback

N/A

Task #4: Find how to earn free stocks

- **"As earlier, I scrolled down until I saw the big gift box... to earn free stocks so.."**
 - Clicks on learn more
- **"So I clicked on learn more and talked about it with friends and how to do it..."**
 - Explores the free stock page

Difficulty

Rating: 1

Valuable

Rating: 4

Questions, Concerns, Feedback

- **It's something that people like because it's free money, so I don't know... something more at the top like "Earn free" or something that might prompt them to join and share it. Like earning something like that because people like free things and money. It's good that it's in there with the box, but having it on the top would entice them more. Because if they go to the site and create their thing and log in, they're not really scrolling all the way down to the bottom. So just more, "hey, earn free stocks", something that grabs their attention and more likely tells other people to invest.**

Task #5: Submit a request to Zinvest

- **"Well, I would go to support, right on the front screen, and go into Contact Us."**
 - Clicks on Support and goes to Contact Us

- **“And then either email or call...or submit a request, oh here it is”**
 - Fills in the Request Form
- **“And then submit the request”**
 - Submits requests

Difficulty

Rating: 1

Valuable

Rating: 5

- **“Extremely valuable, the faster you get to contact us and get the information the better. Normally they would start with the submit a request and hides their actual contact information, but i like the fact that... a lot of people wants to speak to someone, they don’t want to send an e-mail, they don’t want to send an online request, so i think it’s different and good that it starts with the phone number and email without hiding it at the bottom.**

Questions, Concerns, Feedback

N/A

Task #6: Find what documents are needed to open an account in the U.S.

- **“So i’m in the home page... maybe learn”**
 - Attempts to click Learn*
- **“Okay, maybe not Learn, maybe the get started”**
 - Attempts to click Get Started
- **“Okay, maybe not... let’s see, if I keep scrolling down it may give me some more info.”**
 - Continues to scroll down the homepage
- **“Hmm... oh FAQs, i got down to the FAQs part... What type of account can I open with (not clickable in prototype) so i’ll click on that”**
 - Attempts to expand the FAQs*
- **“Or not.”**
 - Goes down to the Footer
 - Clicks on FAQ
- **“The FAQs, okay, I clicked the Faqs all the way at the bottom.... What documents do I need to open my account? It has all the questions here, so i’ll click on that.”**
 - Clicks on View All
- **“And to open an account...”**
 - Attempts to click on “What documents do i need to open my account” (this portion of the link was unclickable)
 - Goes back to FAQ page
 - Clicks on “What documents do i need to open my account” on the FAQs main page

- **“What documents... great. Oh I have a Government ID and a passport, great and I'm ready to open my U.S. account.”**

Difficulty

Rating: 2

- **“Just because it didn't link up to the part I ending up going I guess, but if it did linked up then it would be there”**

Valuable

Rating: 3

- **“Just because I've opened a lot of accounts before and normally they'll ask for this stuff... it's important but not super important.”**

Questions, Concerns, Feedback

- **“It's just a lot of options here to read through (the side menu in FAQs)”**

Task #7: Locate the price for options trading

- **“Okay, probably products, and fees & pricing”**
 - Clicks on Fees & Pricing
- **“It brings me to the U.S. market and it tells me the fees and the types and all that good stuff”**
 - Explores the Fees & Pricing Page
- **“Options fees, and here you go.”**
 - Finds the pricing for options trading

Difficulty

Rating: 1

Valuable

Rating: 5

- **” because fees are important to know.”**

Questions, Concerns, Feedback

N/A

How does our website compare to others?

- **“I think it's good because it brings in a lot of color and fun,like images where it's not the case with other financial websites. Like a lot of them are stuffy and not entertaining to look at. This one does have colors and you can tell there's a whole scheme going on with these people and stuff like that. All the images and everything is very enjoyable.”**
- **“It shows that they put more into it as far as the website is concerned. They are making it more of an experience than normal investing websites that are just like**

bland and informational. Like this one has the information but presented in an interesting way that I would like to look at.”

Was there anything on this website you would like to see?

- “Besides the actual trading portion, I can’t think of too much. Without getting into the trading aspect of it and trading the stock.”

How distracted were you during the process?

- “Not very distracted, nothing like distracted. It was interesting to me, so I wouldn’t say that I was distracted by anything, it was more enjoyable to review and look at.”

Participant 4

Age: 27

Gender: Female

Occupation: Customer Care Representative

Task #1: Learn more about the company

- **"To learn..."**
 - Clicks on Learn*
- **"So if I want to learn more about the company, the first place I'd go is to learn or the company if the learn section does not give me what I want to know and give me the info."**
 - Clicks on Company
- **"Company, oh there ya go."**

Difficulty

Rating: 1

Valuable

Rating: 4

- **"Knowing about the company and story is valuable to me. It makes me see if the company is legit and if the company has history."**

Questions Concerns Feedback

Me: "I noticed you clicked learn first to learn about the company...When you see the company, does it tell you that it's the about page?"

- **"Usually I look for" About Us. Usually at the top, it would be about us instead of, like, company."**

Task #2: Find the list of securities you can invest in

- **"So I want to see a list of things I can invest in... so let's see what products... securities, I don't even know what that is."**
 - Clicks on products and goes into securities
- **"What are securities... oh there ya go, it answered my questions."**
 - Reads through the list of securities

Difficulty

Rating: 1

Valuable

Rating: 5

- **"If i was really interested in like what type of securities I could invest in then...5"**

Questions Concerns Feedback

N/A

Task #3: Locate information about how Zinvest protects your account

- **“How they protect our account...”**
 - Scrolls through the homepage
- **“There’s a thing that says trade with confidence, but let’s see up here (nav bar)... Would it be supported?”**
 - Clicks into FAQs*
 - Reads through the FAQs questions
- **“Fees, deposit, withdraw...account security...”**
- **“How can this app protect my account...”**
 - Goes back to the homepage
 - Scrolls through the homepage
- **“Account Protection...”**
 - Attempts to click account protection on the home page
 - Goes back to FAQs
 - Clicks on view all question in My Account
- **“Yeah, I don’t know...”**
 - Goes back to the Securities page*
 - Goes back to the FAQs page
 - Goes back to Securities Page
 - Goes to Company page*
 - Goes back to securities page
- **“I’m stumped.”**
 - Goes to contact page*
 - Goes back to homepage
 - Reads through the homepage again
 - Goes to fees & pricing*
 - Goes to homepage
 - Goes to company
 - Reads companies page
- **“Okay, it doesn’t seem like it’s in here”**
 - Goes to Securities page
 - Attempts to click on the FAQs
 - Goes back to FAQs
- **“Can I not search account securities?”**
 - Goes back to homepage
 - Goes to homepage
 - Goes to securities
 - Goes to fees and pricing
 - Goes back to Company page
 - Goes back to FAQs page
 - Goes back to homepage
 - Scrolls through homepage
- **“Account protection... I can not click on that, let me scroll all the way down.”**

- Scrolls down the homepage
- **“Why did you have to put it all the way down there?”**

Difficulty

Rating: 5

- **“Because I have a short span, and I don’t scroll all the way down. I was looking in other areas to find it.”**

Valuable

Rating: 5

- **“Because I want to know if my money is safe. I don’t want to take forever looking for... I would assume that if they don’t care that our money is safe, it needs to be more visible... like more on top”**

Questions Concerns Feedback

N/A

Task #4: Find how to earn free stocks

- **“Okay, let's find the free stock.”**
 - Scrolls through the homepage
- **“Learn, I would click learn.”**
 - Attempts to click learn*
- **“Earn free stocks right here too... how, learn more.”**
 - Clicks on learn more
 - Reads the free stock page

Difficulty

Rating: 2

- **“I had to scroll down a lot”**

Valuable

Rating: 3

Questions Concerns Feedback

Me: Do you think it was a lot of scrolling?

- **“Not as much as the other one, not as much as the security one. This one I was like ,”oh, thank god I found it.”**

Task #5: Submit a request to Zinvest

- **“Contact us”**
 - Clicks on support and goes to contact us
- **“I would be like first name, last name.”**
 - Clicks submit
- **“Oh, and I submitted it.”**

Difficulty

Rating: 1

- **"It was easy"**

Valuable

Rating: 5

- **"It's pretty valuable. I like to get questions answered easily if it's not in the FAQs, and that was pretty easy to do."**

Questions Concerns Feedback

N/A

Task #6: Find what documents are needed to open an account in the U.S.

- **"What documents are needed... okay... where did i find it last time? FAQs?"**
 - Clicks on FAQs
 - Reads the questions in the My Account section
- **"What documents are needed to open my account there."**
 - Clicks on the question
- **"And the U.S. here."**

Difficulty

Rating: 1

- **"Easy"**

Valuable

Rating: 4

Questions Concerns Feedback

"It was pretty easy"

Task #7: Locate the price for options trading

- **Options trading... I don't know what that is... Fees & Pricing, let's go there"**
 - Clicks on Fees & Pricing
- **Scrolls down to Options Fees**

Difficulty

Rating: 1

- **"That was easy"**

Valuable

Rating: 4

- **"I don't know what options trading is and it's not relevant to me."**

Questions Concerns Feedback

“It was easy to find, when you asked for pricing, i knew exactly what to press there.”

How does our website compare to others?

- **“It’s very clean. It’s not too many things on one page where you’re overwhelmed. Yeah, it’s very clean and simple. When you scroll down, it’s very straightforward. It tells you what you guys provide and stuff like that.”**
- **“For a person, this is a new company, like, it has all the information, so it’s good.”**

How distracted were you during the process?

- **“No, I wasn’t distracted. It wasn’t like any pop-ups or advertisement”**

Participant 5

Age: 32

Gender: Male

Occupation: Customer Representative

Task #1: Learn more about the company

- **“So I see a link right here to learn. I want to learn about the company.”**
 - Attempts to click on Learn*
- **“Obviously I would go to Company, am I able to click?”**
- Me: “Yes”
 - Clicks on Company
- **“So I would go to the company and it looks like it has mission statements, their history and their team. Yeah, and this is what I wanted to know.”**

Difficulty

Rating: 2

- **“I’d say 2 just because there’s some additional confusion because I kind of latched on to Learn when you said you want to learn about the company. I saw Company so I thought that that’s where their About section would be, so, yeah.**

Valuable

Rating: 5

- **“I think it gave me what I needed because it showed me historical stories and plus a background on them, like it gives you a lot about them.”**

Questions Concerns Feedback

- Me: “Was it clear that Company was an about page?”
- **“It was inferred because usually what I see, it would say About Us instead of company, but it was inferred. When I navigate a website, I do look for that About us site. It’s not always labeled about us. Based on the choices, company was the obvious page.**

Task #2: Find the list of securities you can invest in

- **“I’m not really familiar with financial stuff, but I assume it’s a product of Zinvest securities.”**
 - Clicks Products
 - Goes to Securities
- **“I saw products right there and securities is the first option, and it even answers what securities are, so it’s quick to navigate there.”**

Difficulty

Rating: 1

- **“Not that difficult”**

Valuable

Rating: 5

- **"It's valuable because it has a definition, and it has an FAQs page, so I'd say a 5, valuable."**

Questions Concerns Feedback

- **"It was pretty easy and straightforward"**

Task #3: Locate information about how Zinvest protects your account

- **"Okay, um, i'm first going to go to support because that peaked my interest"**
 - Clicks on Support *
 - Goes to FAQs
- **"I'm going to go to FAQs first, if not, i would go to the bottom of the webpage"**
 - Scrolls through the FAQs page
- **"Oh I found... I don't think I can click here yet... If not, and I didn't find it here, I usually go... I would still go to the FAQ but I can't click on it."**
 - Clicks on Support
- **"Maybe i'll call them"**
 - Goes back to the FAQ page
- **"Yeah, I would go here, but I don't think I'm getting the task correctly."**
 - Goes to Homepage
 - Scrolls through Homepage
- **"I see account protection... Oo secure and background check. There are several places where my answers are here but the FAQ page, and these seem like these are the questions I was asking. There are several places, but I would go to FAQ first."**

Difficulty

Rating: 2

- **"Just because of my own personal style of browsing websites. I like clicking on FAQs and stuff, whereas, for this I didn't have to click anywhere but scroll down to here. It was a little bit of scrolling, if there was another place where it has specific information like maybe on that FAQ page, If I click on that question, "How is my money safe and secure", like it says that, that'd be great too."**

Valuable

Rating: 5

- **"It shows me that... it even has this background check available, so it went above and beyond"**

Questions Concerns Feedback

- Me: Did you think it was a lot of scrolling?
- **"I think because it's missing a scroll bar here, I don't know how much it is, but it does feel like a little much, maybe this stuff (the middle section), but only that"**

because everything else seems important. Maybe move this (free gift) to the bottom of the page because I would want to learn more about how secure my account is than earning free stocks, but then again I don't really know much about investing. This is just me loving to go on websites.

Task #4: Find how to earn free stocks

- **"Well usually when I see ads, I usually go to the bottom of the pages because that's where they usually have the site map. Once I am scrolling, I see it right away."**
 - Scrolls through homepage to free gift section
- **"Yeah, I found it, and learn more..."**
 - Clicks on learn more
- **"It's giving me step-by-step instructions on what to do and more way to earn more rewards."**

Difficulty

Rating: 1

- **"Not difficult"**

Valuable

Rating: 5

- **"It was very valuable just because it kind of took me to a different page and it told me steps by steps on how to do it, so it was very valuable."**

Questions Concerns Feedback

- **"It was pretty straightforward, it was great"**

Task #5: Submit a request to Zinvest

- **"Usually, from my experience with websites, I can either go to the very bottom to find Contact Us if it's not very obvious here, but I just click support and Contact Us because that's how I do it."**
 - Clicks on Support in Nav bar
 - Goes to Contact Us
- **"I would submit a request...if i needed to wechat or call so yeah."**
 - Submitted the info
- **"Cool, it has something for attachments, and I will hit submit."**
 - Clicks on Submit
- **"Cool, and it lets me know that the request has been submitted. I don't have to wonder if it went through because in my experience, even in my job, sometimes I don't even know if my contact request went through."**

Difficulty

Rating: 1

- **"Not difficult at all"**

Valuable

Rating: 5

- **"It was very valuable"**

Questions Concerns Feedback

"I thought it was a very well made Contact Us page just because it also had the ability to attach which I don't find often in these contact us pages, unfortunately. Just in case I needed to add something, the ability was there."

Task #6: Find what documents are needed to open an account in the U.S.

- **"I'm going to go to FAQs first, just for fun"**
 - Clicks on FAQs
- **"Oh, what documents do I need to open my account?"**
 - Clicks on the link
- **"There, that's the documents that I need... U.S."**

Difficulty

Rating: 5

- **"Not that difficult"**

Valuable

Rating: 5

- **"It was very valuable because once I got into the FAQ and it was the first question there. Once I got into my question, it even separated what is needed in different countries, so that was good."**

Questions Concerns Feedback

N/A

Task #7: Locate the price for options trading

- **"So I'm going to go into products because that's where I assume it's going to have pricing and all that. Right away I see fees and pricing."**
 - Clicks on Fees & Pricing
- **"So I'm in the U.S. market... type Options trading.."**
 - Scrolls through the pricing page
- **"Oh, here we go, options trading, great prices because I have a lot of experience in it"**

Difficult

Rating: 1

- **"Not Difficult"**

Valuable

Rating: 5

- **"It was very valuable because I even saw that there's a link for more details and it separated because I know how important how the other markets are, so that's cool.**

Questions Concerns Feedback

How does our website compare to others?

- **"I think it's a very easy to use website. It has all the corner stones that I like to look for in a website, like, the contact team. You actually list your phone number and all that. So there's customer support available. It's not so many categories on the top that I'm overwhelmed, like, I have so many options here.. Yeah. It's simple-ness, but not really. It's like an outward simple-ness, but it has all the information you need. It compares very well to other websites I've seen.**

How distracted were you during the process?

- **"I was not distracted because there were no ads from what I saw. It was pretty easy to navigate without seeing something that caught my eyes. And yeah, so I don't think I was distracted at all on this website. I feel like it has so many cool illustrations here that makes it modern, like, this and this, but I wouldn't say it's distracting.**

Questions Concerns Feedback

Me: "Anything we could improve on?"

- **"Probably what i said earlier about the home page because it does everything you need, but I don't know if it'll stop people from... because sometimes on a homepage, i find it easier to find less information because you can have this at the bottom easily, but then again, all of these information is needed. The scrolling is the only thing that tripped me up in the home page"**

Participant 6

Age: 21

Gender: Male

Occupation: Marketing Coordinator

Task #1: Learn more about the company

- **“Obviously if I want to learn more about Zinvest, I would go straight to the header and find the button Learn. I should click on Learn.”**
 - Attempts to click on Learn
- **“I either press Get Started...”**
 - Attempts to click on Get Started
- **“... Or if I want to get straight to downloading the app, I would learn more, do this. I would have the app texting me.”**
- **Okay, products... I was thinking about the word learn, I want to learn more about the products.. Okay, products**
 - Clicks on Products
- **“... And then Fees & Pricing...”**
 - Clicks on Fees & Pricing
- **“... I’ll probably click on Fees and pricing first to see... go through here...”**
 - Exploring the Fees & Pricing Page
 - Reading the content
- **“I’ll probably go to securities...”**
 - Clicks on Securities in Products
 - Scrolls through the Securities page

(I had to re-read the task again)

- **“Oh the background...”**
 - Clicks on Company
- **“In that sense, I was thinking about learning more about, like, what it is and how to do it as far as that. Since we are learning more about the company...”**
 - Scrolls through the company’s page
 - Reading the Page
- **“Okay, so, break down the history. Break down who works here and our team... okay, we’re hiring.”**

Difficulty

Rating: 1

- **“I think if I did what you asked to learn more about that company, I think I’d probably click Company right off the bat versus going to Learn. My eyes went straight over company, I don’t know why. It is pretty straightforward for what it is in terms of difficulty. I think if I wanted to learn more about the company, I’d” click Company, but I guess it is my personal misunderstanding.”**
- Me: “What would make it more clear to you?”

- **“Having About Us instead of Company. Everything else is fine, inside here, but navigating from the homescreen to this (Company) changing... the typical About Us, like, “oh, about us.” but that’s just my opinion on that. ”**

Valuable

Rating: 5

Questions, Concerns, Feedback

N/A

Task #2: Find the list of securities you can invest in

- **“Since I already navigated the whole website, before by accident, I’ll click on products and then securities.”**
 - Clicks on products to get to the securities page
- **“Securities... and there they all are, right there.”**

Difficult

Rating: 3

- **“If I didn’t see this earlier and I was trying to figure out what I could invest in, maybe... It comes out of personal preference. Like products, like the word products to me, I think of e-commerce as far as what types of shirts they sell or pants they sell versus this with products. If it was Products, like it’s own tabs like ‘what can I invest’ under something, but I honestly don’t know. It will take me a few clicks to figure out what I can invest in, I think at least.”**

Valuable

Rating: 5

- **“I mean, once you go and see... it answered my questions... it has stocks, ETFs, Options, and then the description under that is good as well.**

Questions, Concern, Feedback

- **“No, because it has the FAQs and the blog as well.**

Task #3: Locate information about how Zinvest protects your account

- **“So I’m looking to see how secure Zinvest is. Usually, a lot of people don’t start with that part. Usually it’s at the bottom, kind of like the back-end of things.**
 - Scrolls through homepage
- **Usually it’s not in fine print, usually people, huh, it’s right there. So that falls pretty much align to what I usually see. It’s not like they throw it at the top or have a little bar for it. It’s usually pretty normal, easy.**

Difficulty

Rating: 1

- **“I think if people are trying to find specifically that and trying to go through block to block and just trying to find it in a block. Because if they’re only coming on this website and only trying to find this one versus browsing around and they happen to find it. If they click to click to click, it may be difficult with this. Like you said, there are many ways to find it, in the main side of things, it would be in products and account protections and something like that. This task is easy for me.”**

Valuable

Rating: 5

- **“It tells me everything. It tells me where Zinvest is, like who regulates Zinvest, like how much and what markets, so yeah.”**

Questions, Concerns, Feedback

N/A

Task #4: Find how to earn free stocks

- **“For me, I would just go into products first.”**
 - Clicks on Products in nav bar
 - Looks for Free Stocks
 - Clicks out of nav bar
 - Scrolls down homepage
- **“If i don’t see it, I will just go down. That would be my process if i’m trying to find something specific.”**
 - Scrolls down to the free gift section
- **“Boom, right there, cool. So do learn more.”**
 - Clicks on Learn more
- **“Alright, cool, it gives me a step-by-step thing.”**

Difficulty

Rating: 1

- **“It was pretty easy. It tells me everything I need to know.”**

Valuable

Rating: 5

Questions, Concerns, Feedback

- **“No, I don’t think so. Obviously, me personally, I’m super big on the dropdown and navigation bar. I’m big on that. Obviously you can fit so much in the navigation bar, but maybe there is another way to access it through the navigation bar. This probably works for most people, but, I don’t know where to go from that. When I go to the navigation bar, I see what we offer, like about us, contact us, or a support, and our big promotion, like our free stock, and I think that’s really it. So having the app, about us, learning... I think having the free stock, accessible in the**

navigation bar to promote that like, “hey, we also offer free stocks.” if people are just browsing and they happen to come across Zinvest.”

Task #5: Submit a request to Zinvest

- **“I would go to Support and then Contact Us”**
 - Clicks on Support and goes to the Contact Us page
 - Attempts to click on Email
- **“There's the e-mail, oh, there's a submit request, I can just make the request right there.”**
 - Submits the form

Difficulty

Rating: 1

- **“That was very straight forward”**

Valuable

Rating: 5

- **“It was pretty straightforward in that sense. It tells me at the very end that it has been submitted and it kind of confirms that. I don't have to go back and make sure I don't send another email.**

Questions, Concerns, Feedback

- **“No, but this took me to a different page, didn't it?”**
- Me: “Yes”
- **“So it takes me to another page. It shows me other questions without submitting feedback, which is pretty cool.”**

Task #6: Find what documents are needed to open an account in the U.S.

- **“Okay, i'll try here first”**
 - Clicks on Product to see if you can find documents about it
- **“So my first thought was trying to go into products first to find a ‘How To’ or like Get Started, but it could've been done under Download Zinvest, but that makes me think that maybe it's just a link to download the app or something. In my head i'm just kind of scrolling down until I find something.”**
 - Scrolls down the homepage
- **“Until it shows me what documents... kind of something like I mentioned with safe and secure. It's not something you would really like put at the top like, “what documents do you need”, it'll probably be towards the bottom, like an FAQs. Maybe it'll be in ‘view all question’**
 - Clicks on ‘View all Questions’
 - Gets directed to the FAQs page
 - Finds and clicks on ‘What documents do I need’ link
- **“Cool. I just realized I could've gone to that page under support too.”**

Difficulty
Rating: 1

Valuable
Rating: 5

- "It answers all of my questions"

Questions, Concerns, Feedback
N/A

Task #7: Locate the price for options trading

- "Fees & Pricing"
 - Clicks on Fees & Pricing
 - Finds Pricing for Options Trading

Difficulty
Rating: 1

- **"Pretty easy. Maybe because I've seen it a few times when I clicked on here. It was also straightforward. If I wanted to know how much it cost, there's a thing that say's Fees & Pricing right there. So it was easy to just click and scroll down until I see Options"**

Valuable
Rating: 5

Questions, Concerns, Feedback
N/A

How does our website compare to others?

- **"I think it's super clean and it's not wordy. As far as the design of everything, it's unique in that sense. You don't see a lot of the ones that kind of follow all of these same designs on the website as well. It's more friendly, from what I've seen with other websites as well. I think it's more friendly as well."**
- Me: "Is there anything we could improve on or things you would like to see?"
- **"I think the only thing this would be, it's a personal thing as well, would be the navigation bar in that sense. Just because the word 'Products' was a big hurdle at the very beginning. Besides that, i think everything gets answered, just by browsing the homepage, you learn about Zinvest and what you could trade in. And how it operates in that sense, and what you could do within Zinvest and what else it offers."**

How distracted were you during the process?

- **"I don't think I was that distracted. I don't think there were things that distracted me. Everything was expected, but as i mentioned with the stuff that you don't start**

with, you go through with other stuff on the way, you don't expect the nitty gritty
FINRA and SIPC stuff be at the very top, so.