



BUDGETS **TO** BLUEPRINTS

USER EXPERIENCE RESEARCH PLAN

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JRMC 7013

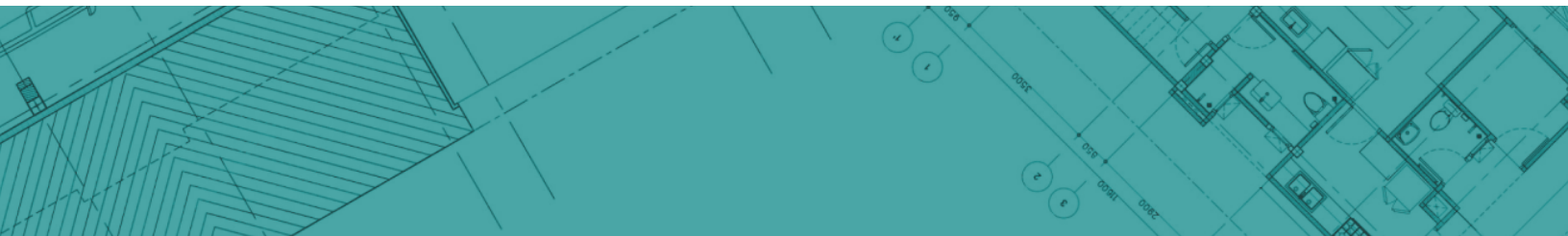


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EXECUTIVE SUMMARY

INTRODUCTION

With so much to learn about money and financial planning, Budgets to Blueprints is here to teach a range of financial literacy topics to a student near you! Budgets to Blueprints is an interactive website aiming to educate young people about financial topics that matter most to them. It takes learning to a new level and features a storyline where students build a house (and their knowledge) through gaming and trivia.

Budgets to Blueprints isn't your typical finance lesson; it's an immersive journey designed for young minds. This website merges financial literacy and gameplay to make learning fun and engaging for high school and college students. Did you know that 3 in 4 teenagers do not feel confident in their knowledge about finances? This resource is here to make learning about it more exciting.

Exploring the content-heavy field of finance through a website game, students dive headfirst into concepts like budgeting and loans, crafting their digital dream homes along the way. What sets this website apart from other educational resources is its dynamic approach through gamification and interactivity, breaking away from the traditional style of lengthy articles and video lectures. With Budgets to Blueprints, financial literacy evolves into an enjoyable journey, transforming education into an interactive and memorable experience for students.

RESEARCH GOALS

1. Evaluate the user experience (UX) of our website, focusing on design and interactivity during the home building and trivia portions, as well as overall engagement with the content.
2. Assess the effectiveness of our gamified approach in teaching financial topics.
3. Seek feedback on the chosen topics to ensure alignment with the needs and interests of our target users.

Hypotheses

We believe that integrating gameplay elements and interactive features on the website will enhance user engagement and satisfaction. Additionally, we expect the gamified learning approach to be effective in teaching financial topics to our target audience of young adults, so they not only enjoy the game, but also retain information.

Considering the dynamic and personalized nature of the website, we expect users to be motivated to explore and absorb financial knowledge during their initial visit, aligning with our assumption that users are more likely to engage with the site once rather than repeatedly.

Utilization of Results

The results from the UX testing will provide insights into the strengths and weaknesses of our website as a whole. This information will guide us in making improvements to boost engagement and satisfaction for our targeted users.

Importance and Relevance of Tests

Conducting UX testing is critical for assessing the overall effectiveness of Budgets to Blueprints. These insights will be used to further develop the website's design, interactivity, and content, ensuring it provides an engaging, enjoyable, and educationally successful experience for users on our site.

METHODOLOGY

ROLES

Roles and functions are divided among team members, Catherine Tran and Heaven Robinson. Heaven is the Interviewer and is responsible for leading participants through testing sessions. She reads the script and guides users through the website. Catherine is the Notetaker and is responsible for documenting and observing testing sessions. Both members take part in collecting data and analysis.

SAMPLING

Population

Our target users are high school and college students, and the general young adult population in the state of Georgia. The reason we are specifically targeting Georgia is to facilitate ease of testing and provide more relevant home building options and financial content tailored to regional curriculum. We aim to refine and optimize our platform based on the specific needs and preferences of users in Georgia.

In terms of behavioral considerations, our target audience has a history of using gaming as a learning tool and engaging with online games. These users may have encountered personal finance education in their high school or undergraduate curriculum, and we believe that incorporating gamified elements will resonate well with their learning preferences.

- **Age:** 15–24
- **Gender:** Male, Female
- **Race:** White, Black, Asian, Hispanic, Two or More Races
- **Education:** Some high school, High school diploma, Some college, Bachelor's degree
- **Income:** Ranging from no income and financially dependent on parents, to working full-time and gaining financial independence
- **Location:** Focusing primarily on young adults in Georgia, USA
- **Wants:** A fun learning experience, To feel confident in making financial decisions, User-friendly digital tools
- **Needs:** Education about the most relevant financial topics like budgeting, credit, and loans; To learn about finance in an effective way that they can implement in their lives

User Personas

Persona #1: High School Student



Ryan Marshall

17 years old / Junior in High School / Buford, GA

Ryan Marshall is a 17-year-old junior at Buford High School. He lives with his parents and younger sister in an upper middle-class neighborhood. Ryan has a B average in his classes, and hopes to improve his grades before applying to college. He especially enjoys math and science, and enjoys using technology both for education and leisure. He aspires to study engineering in college, and his goal is to work as a mechanical engineer in the future.

Ryan also enjoys being outdoors hiking and playing basketball with friends. He loves computers and video games like *The Last of Us*, and often participates in online gaming communities on Twitch and Discord.

He receives an allowance from his parents, but doesn't really know how to spend responsibly. He took a finance course two years ago, but needs a refresher before living on his own.

He is knowledgeable about various technologies and often helps his friends and family troubleshoot issues. For school, he uses digital resources like ChatGPT and Quizlet to help study. Ryan is always looking for tech news and latest trends, and he loves trying out new platforms and learning different topics.

Persona #2: College Student



Maya Gomez

21 years old / Third Year in College / Athens, GA

Maya Gomez is a 21-year-old full-time student currently in her third year at the University of Georgia. She lives in an off-campus apartment with a group of friends. Maya is known among her peers for her strong work ethic and her involvement in various extracurricular activities. She is a journalism major and plans to work as an editor at the local news station back home after graduation. She strives to become more independent, and values networking to ensure a successful career.

Maya enjoys covering events on campus for the Red & Black and frequently participates in community service in the Athens area. She maintains an active lifestyle and often plans trips with friends to explore new cities and cultures.

She often spends beyond her budget and doesn't really think about the repercussions. She has financial aid through scholarships and loans to fund college and living expenses.

She relies on her laptop and iPhone for research, writing, and taking photos of her adventures. Her go-to games to play are Monopoly and Sims. Maya frequents Twitter, LinkedIn, and Instagram to stay updated on current events and share her work.

Persona #3: Working Young Adult



Simone Starks

23 years old / Childcare Worker / Tifton, Georgia

Simone Starks is a 23-year-old childcare worker at a daycare center in Tifton, Georgia. She lives in a rented apartment and has a close circle of friends and family. She has a high school diploma, and has been working at the center for four years. Simone is currently saving to pursue certifications and training to become a childcare center director. She is passionate about providing a safe and enriching environment for children. Simone aims to achieve financial stability and independence, allowing her to live comfortably and pursue her educational and career goals.

In terms of finance behaviors, Simone is diligent about saving money and is on top of her credit. She is interested in other financial ventures like investing, but doesn't know where to start.

Simone enjoys creating educational activities for the kids and paints in her free time. She likes going for walks and has a small garden on her balcony.

Although she is comfortable with technology, she prefers face-to-face interaction and mainly uses an iPhone to communicate with parents or play mobile games like Episode. She occasionally uses YouTube to share resources with the children at daycare, and often uses Facebook and Instagram to stay in touch with friends and family.

Sampling Frame and Method

Identification

Based on our user personas, the test subjects are a combination of high school and college students, and working young adults. We plan to sample 10-12 people for user testing. A key requirement for inclusion is that the subjects have a limited knowledge of finance. That way, we can tailor the website content and design to best support those that are not as confident in finance.

The subjects' race, age, gender, and level of technology skills vary in order to be representative of the larger population. This approach ensures that our website addresses the needs and challenges faced by a wide section of the young adult population.

Recruitment

Recruitment responsibilities are shared among team members to maximize outreach. Whether it's students or working adults, no member is limited to recruiting from a certain group. Participants are contacted remotely through email, social media messaging, and student organization communication channels.

An opportunity for recruitment is gathering a diverse representative sample, capturing financial literacy needs from a variety of backgrounds and gaining insights from a wide range of perspectives. Potential challenges in recruitment may include varying levels of online engagement and response rates. In this busy and crucial time in their lives, participant availability is uncertain and requires effective communication and flexibility.

Testing

Given the diverse nature of our sample, we are primarily conducting user testing via Zoom for flexible scheduling and to accommodate geographical distance between team members and participants.

TESTING INSTRUMENTS

User testing is conducted over Zoom with screen recording. Participants need a laptop or desktop computer with the Zoom application downloaded and navigate to the website through Google Chrome. The participants share their screen and we observe their actions.

Testing begins on the home screen of budgetstoblueprints.com. The timer is started once all task instructions have been stated and is stopped once the user completes the task or gives up before completion.

Script

Hi, _____. My name is Heaven Robinson and I will be walking you through this session today. Before we begin, I have some information for you, and I'm going to read it to make sure that I cover everything. We're asking people to visit the Budgets to Blueprints website to see whether it works as intended. The session should take about 40 minutes.

The first thing I want to make clear right away is that we're testing the website, not you. You can't do anything wrong here. In fact, this is probably the one place today where you don't have to worry about making mistakes.

As you use the website, I'm going to ask you as much as possible to try to think out loud: to say what you're looking at, what you're trying to do, and what you're thinking. This will be a big help to us. Also, please don't worry that you're going to hurt our feelings. We're doing this to improve the site, so we need to hear your honest reactions.

If you have any questions as we go along, just ask them. I may not be able to answer them right away, since we're interested in how people do when they don't have someone sitting next to them to help. But if you still have any questions when we're done, I'll try to answer them then. And if you need to take a break at any point, just let me know.

With your permission, I'm going to record what happens on the screen and our conversation. The recording will only be used to help me figure out how to improve the website, and it won't be seen by anyone except me.

Any questions so far?

[Start recording]

Alright. Before we look at the site, I'd like to ask you a few quick questions.

1. What is your age?
2. Could you share your race, ethnicity, and gender?
3. What does your typical day look like? Do you work or go to school?
4. What device are you joining this session on?

Great. I'd also like you to fill out this pre-test survey.

[Share link to Pre-Test Survey]

Thanks! Let's get to the website.

[Share link to website: budgetstoblueprints.com]

I just shared the link to our website, Budgets to Blueprints, in the chat. Please navigate to it and share your screen with me so we can begin.

First things first, I'm going to ask you to look at the homepage and tell me what you make of it: what strikes you about it, what you think you can do with it, and what it's for. Just look around and talk me through your thoughts. Please don't click on anything yet.

Make notes of any observations here.	
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Thank you. I'm going to ask you to accomplish a series of tasks to the best of your abilities. And again, as much as possible, try to think out loud as you go along. Ready to get started?

[Testing begins with Task Table]

Thank you, that was very helpful. Now, we're going to use Microsoft's Product Reaction cards to help capture your impression of the site. Please pick the five characteristics you feel best describe the Budgets to Blueprints website, and tell me why you've picked each one.

[Share screen with copy of Product Reaction Cards. Take notes about the participant's choices and the reason why they selected the specific word c]

Make notes of any observations here.	
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Great. Lastly, I'm going to ask you to fill out one final survey. I'm sharing with you a link to the post-test survey. Please fill this out within the next 24 hours while the website is still fresh in your mind.

[Share link to Post-Test Survey]

Are there any other questions or thoughts you'd like to share?

Make notes of any closing thoughts here.	
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And that's it! Thank you so much for your time and help with this project.

Consent Form

Purpose

The researchers, Catherine Tran and Heaven Robinson, are conducting a usability study to evaluate the design of the Budgets to Blueprints website. The results will be used to help improve the website design. This test is being performed as part of the Emerging Media Masters program curriculum at the University of Georgia. The study will take approximately 40 minutes.

Procedures

As a subject, you will be asked to:

1. Fill out a pre-test survey
2. Complete a series of tasks on the website
3. Consent to being observed and recorded
4. Give feedback on your experience
5. Complete a post-test survey
6. Fill out a Product Reaction Card Form

Confidentiality and Voluntary Participation

Participation in this usability study is voluntary. The descriptions and findings will be used to compile a report about the website's effectiveness. However, at no time will your full name be used. With your permission, I would like to take photos, videos and notes to share with faculty members at the University of Georgia's New Media Institute.

You are at liberty to withdraw your consent to the experiment and discontinue participation at any time. If you have any questions please contact Catherine Tran (catherine.tran@uga.edu) or Heaven Robinson (heaven.robinson@uga.edu).

You can also reach out to our instructor, Kyla Sterling, at ksterling@uga.edu. By signing below, you are indicating you understand the information on this form:

Participant Signature

Date

Pre-Test Survey

<p>How would you rate your current level of financial literacy?</p>	<p>Very Low 1 2 3 4 5 Very High</p> <p><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>Have you learned about finances in school? If yes, when?</p>	
<p>Which of the following financial concepts do you feel most confident about?</p>	<p><input type="radio"/> Budgeting <input type="radio"/> Credit Scores</p> <p><input type="radio"/> Investing <input type="radio"/> Other: _____</p>
<p>How interested are you in learning more about personal finance?</p>	<p>Not at all Interested 1 2 3 4 5 Extremely Interested</p> <p><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>I think learning about finances and money management is...</p>	<p>Boring 1 2 3 4 5 Exciting</p> <p><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>I consider the concept of credit scores to be...</p>	<p>Abstract 1 2 3 4 5 Concrete</p> <p><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>How likely are you to go online to learn new topics?</p>	<p>Not at all Likely 1 2 3 4 5 Extremely Likely</p> <p><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>What websites, apps, or other resources do you explore to learn new topics?</p>	
<p>Have you ever used games to learn new topics? If yes, what types of games did you play?</p>	
<p>I find interactive and customization games like The Sims to be...</p>	<p>Stressful 1 2 3 4 5 Relaxing</p> <p><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>Do you enjoy playing trivia? Why or why not?</p>	

Task Table

Task	Success / Failure	Time on Task / Observations	Post-Task Question
<p>Task 1: Imagine you're a high school student interested in learning about finance. You've just landed on the website. Where would you go first to start the game?</p>	<p>Success / Failure</p> <p>*Success: Home > Get Started button</p>		
<p>Task 2: You have started the game and want to know more about what to expect. Please explore the welcome pages to learn about how the game integrates gameplay elements and interactive features. Stop once you reach the third page.</p>	<p>Success / Failure</p> <p>*Success: Welcome 1 > Next button > Welcome 2 > Next button > Welcome 3</p>	<p>Time on Task: _____</p>	<p>What is the website "Budgets to Blueprints" about and what is the objective upon completion?</p>
<p>Task 3: In the first part of the home building process, you have to decide the location. Navigate through all the location options.</p>	<p>Success / Failure</p> <p>*Success: Location > Click arrow buttons</p>		
<p>Task 4: You want to know more about the individual location options and what each place has to offer. Explore all the options and make your selection.</p>	<p>Success / Failure</p> <p>*Success: Location > Click arrow buttons > Select</p>	<p>Time on Task: _____</p>	<p>Is there enough or too much text on a single card? The page as a whole?</p>

Task	Success / Failure	Time on Task / Observations	Post-Task Question
<p>Task 5: You really want to get a more visual feel of the location. Where would you find an accompanying image?</p>	<p>Success / Failure</p> <p>*Success: Location > Image on right of card</p>		<p>Is the illustration style appealing? Is the image size too small or large?</p>
<p>Task 6: You have fallen in love with Athens, Georgia and want it as the location of your home. How would you choose Athens?</p>	<p>Success / Failure</p> <p>*Success: Location > Select button</p>		
<p>Task 7: Congrats! You just made your first home building decision. How would you navigate to the next section, Trivia Terrace?</p>	<p>Success / Failure</p> <p>*Success: Transition 1 > Play Trivia Terrace button</p>		<p>How do you feel about having 10 rounds?</p> <p>What do you suspect Trivia Terrace is?</p>
<p>Task 8: You're specifically interested in learning about budgeting. Where would you go to find the Budgeting section?</p>	<p>Success / Failure</p> <p>*Success: Trivia Terrace > Budgeting</p>		<p>Do you have any initial thoughts on the design?</p>
<p>Task 9: Since it's your first time at Trivia Terrace, you want to start off with an easy question. Select the 200-level difficulty question in the Budgeting category.</p>	<p>Success / Failure</p> <p>*Success: Trivia Terrace > Budgeting > \$200</p>		

Task	Success / Failure	Time on Task / Observations	Post-Task Question
<p>Task 10: You've reached your first trivia question. Read over the question and answer choices, and submit your choice.</p>	<p>Success / Failure</p> <p>*Success: Trivia Card > Radio button > Submit button</p>	<p>Time on Task: _____</p>	<p>Is there enough or too much text on the card?</p> <p>Would you like to see a visual?</p>
<p>Task 11: You just learned something new about finance in a quick and easy way and are eager to learn more. Navigate to the 400-level difficulty question in the Credit Score category.</p>	<p>Success / Failure</p> <p>*Success: Trivia Terrace > Credit Score > \$400</p>		<p>How do you feel about the level of interactivity with Trivia Terrace?</p>
<p>Task 12: After your last choice in Trivia Terrace, you are met with another multiple-choice question. Read over the question and answer choices, and submit your choice.</p>	<p>Success / Failure</p> <p>*Success: Trivia Card > Radio button > Submit button</p>	<p>Time on Task: _____</p>	
<p>Task 13: You've answered two questions and are ready to move on to make your next home building decision. Where would you go to continue on to the game?</p>	<p>Success / Failure</p> <p>*Success: Trivia Terrace > Continue button</p>		<p>Each round consists of two trivia questions. Do you anticipate that being an adequate number of questions at once throughout the rounds?</p>

Post-Test Survey

<p>How would you rate your overall experience with the Budgets to Blueprints website?</p>	<p>Poor 1 2 3 4 5 Excellent</p> <p style="text-align: center;"> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> </p>
<p>I would use Budgets to Blueprints to learn more about financial topics.</p>	<p>Not at all 1 2 3 4 5 Extremely Likely</p> <p style="text-align: center;">Likely <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>To what extent do you believe the game contributed to your knowledge of finance?</p>	<p>Not at all 1 2 3 4 5 Extremely</p> <p style="text-align: center;"><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>Did you feel like the financial topics covered were interesting and relevant to you?</p>	
<p>Are there any other financial topics you'd like to see included?</p>	
<p>I think the user interface and design of the game was _____ to navigate.</p>	<p>Difficult 1 2 3 4 5 Easy</p> <p style="text-align: center;"><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>The game graphics and design were...</p>	<p>Dull 1 2 3 4 5 Appealing</p> <p style="text-align: center;"><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>I think the combination of home building and trivia in one game is...</p>	<p>Distracting 1 2 3 4 5 Exciting</p> <p style="text-align: center;"><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>How engaged were you while playing the game?</p>	<p>Not at all 1 2 3 4 5 Extremely Engaged</p> <p style="text-align: center;">Engaged <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p>
<p>What specific features of the website did you enjoy the most?</p>	
<p>Any other comments?</p>	

Product Reaction Cards

Accessible	Creative	Fast	Meaningful	Slow
Advanced	Customizable	Flexible	Motivating	Sophisticated
Annoying	Cutting Edge	Fragile	Not Secure	Stable
Appealing	Dated	Fresh	Not Valuable	Sterile
Approachable	Desirable	Friendly	Novel	Stimulating
Attractive	Difficult	Frustrating	Old	Straight Forward
Boring	Disconnected	Fun	Optimistic	Stressful
Business-like	Disruptive	Gets in the Way	Ordinary	Time-consuming
Busy	Distracting	Hard to Use	Organized	Time-Saving
Calm	Dull	Helpful	Overbearing	Too Technical
Clean	Easy to Use	High Quality	Overwhelming	Trustworthy
Clear	Effective	Impersonal	Patronizing	Unapproachable
Collaborative	Efficient	Impressive	Personal	Unattractive
Comfortable	Effortless	Incomprehensible	Poor Quality	Uncontrollable
Compatible	Empowering	Inconsistent	Powerful	Unconventional
Compelling	Energetic	Ineffective	Predictable	Understandable
Complex	Engaging	Innovative	Professional	Undesirable
Comprehensive	Entertaining	Inspiring	Relevant	Unpredictable
Confident	Enthusiastic	Integrated	Reliable	Unrefined
Confusing	Essential	Intimidating	Responsive	Usable
Connected	Exceptional	Intuitive	Rigid	Useful
Consistent	Exciting	Inviting	Satisfying	Valuable
Controllable	Expected	Irrelevant	Secure	
Convenient	Familiar	Low Maintenance	Simplistic	

ANALYSIS

Task Analysis

Tasks will be analyzed by time on task, success rate, and error rate. Because of our sample size, we will be using a 95% confidence interval when calculating the task success.

Additionally, the data will be segmented based on age, given that the target audience comprises high school and college students. This segmentation will allow us to identify any potential differences in task performance across different age groups.

Survey Analysis

Pre and post-test surveys will be conducted using Google Forms to gather both quantitative and qualitative data. In analyzing the qualitative data, we can identify recurring themes and patterns in users' responses. We hope to collect valuable information such as users' opinions of the website's effectiveness in teaching financial issues, satisfaction levels, and any special insights into their behavior and emotions. In addition, charts and graphs will be used to visually convey and explain quantitative metrics relating to user behavior and overall satisfaction.

Product Card Analysis

We will analyze feedback from the Product Reaction Cards, focusing on users' emotional responses and specific likes or dislikes by asking them to choose five reaction cards they feel best describe our site. When presenting this data to our audience, we plan to create comprehensive reports and visualizations such as a word cloud to show the distribution of the chosen reaction. This will make it easy for our audience to identify the main emotional responses and key likes and dislikes expressed by the users. The visual representation will improve the data's accessibility and interpretability, allowing for more effective sharing of user feedback.

Major and Minor Issues

Major and minor issues will be categorized based off our user research. The major issues are problems that significantly blocks the users' ability to navigate smoothly through the site or understand financial topics. Minor issues are smaller usability issues that while still important, just enhances the users' overall experience with the website.

CONCLUSION

This research plan will focus on task analyzation and success rates, ensuring a thorough understanding of how participants interact with Budgets to Blueprints. The use of pre and post-test surveys, as well as Product Reaction Cards, allows for a thorough assessment of user satisfaction, perceived learning, and overall usability.

Based on user feedback, major and minor concerns will be carefully considered to see what changes will be best for the site. This research plan is not only to gather valuable insights, but to also ensure that Budgets to Blueprints plays its role as an engaging and educational resource for young adults to come to whenever they are wanting to learn more about personal finance.