

InvestorScope: Low-Fi Prototype & Test

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Overview



A small feature of initial project idea
User testing suggests discovery as a pain point
Low-fi tests to iterate on re-designed concept

Mission Statement

“To create a seamless and intuitive way for beginning to intermediate investors to discover new and under-appreciated investment opportunities.”

#1: Simple Lookup

“A user wants to look at relevant information for a specific company or ticker.”

#2: Automated Discovery

“A user answers some questions and then receives an automatically generated recommendation.”

#3: Manual Discovery

“A user filters down a large list of investments to a small number of candidates, often by looking at financial indicators.”

← INTC ☆

\$ 31.58
+0.64%

Why: Intel is another very stable tech firm with great fundamentals.

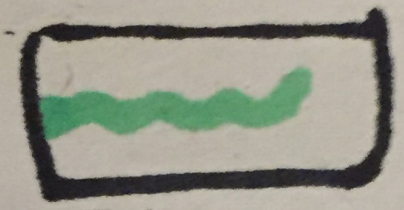
Fundamentals Price Chart

Headlines

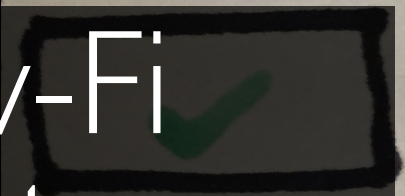
4:33 PM New chip rolls out to embedded device...



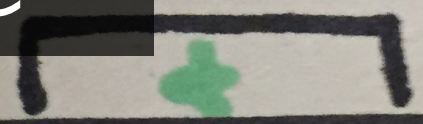
🔍 AAPL ⊗



Following

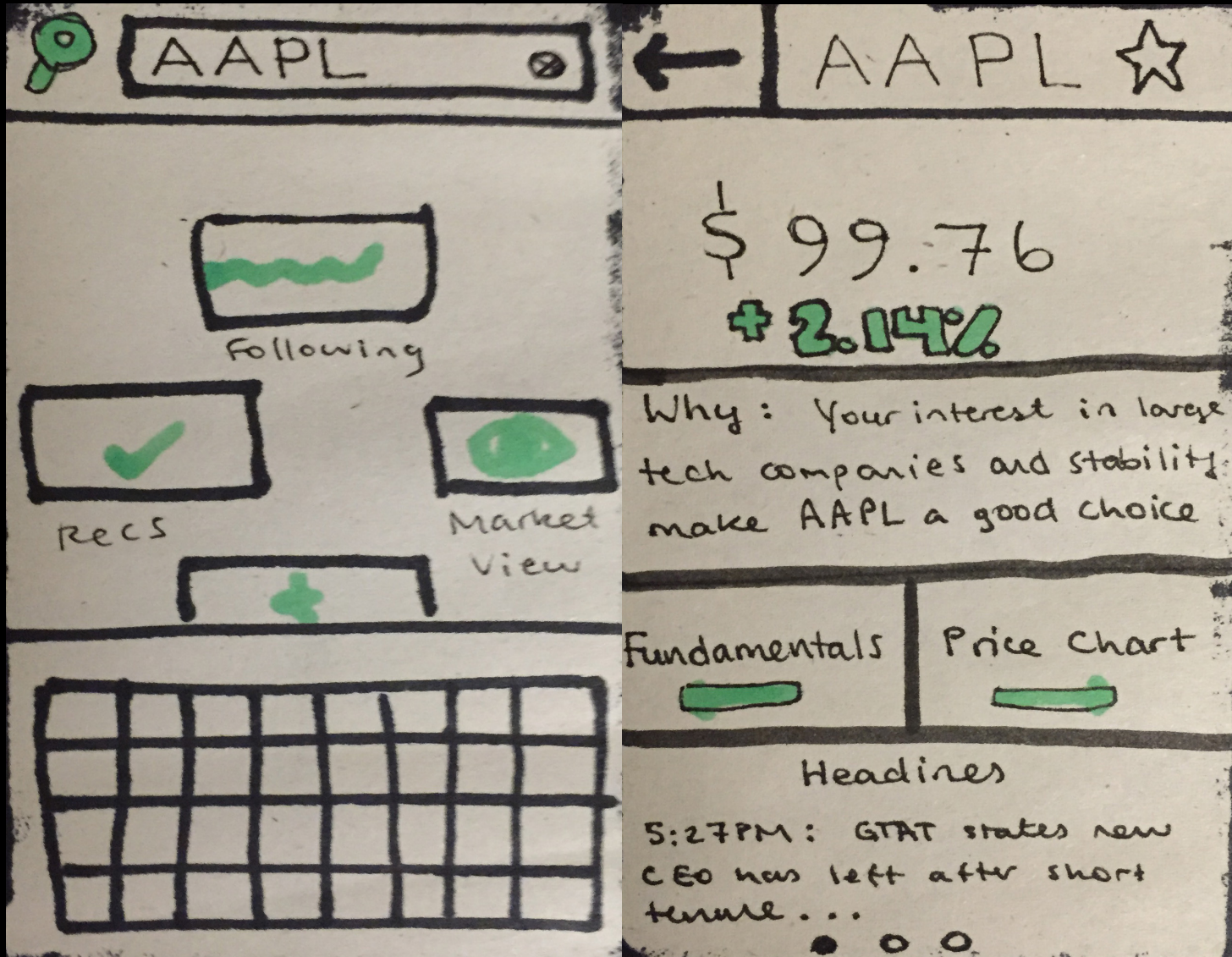


Market View



Low-Fi Prototype

Scenario #1: Lookup



Scenario #2: Automated Discovery

Which sector of the below listed interests you most?

Pick one:
[SWIPE to go back]

Tech	Energy
Defense	Entertainment

Working

...

We recommend

AAPL, INTC, and FB.

Swipe to have a look! →

← INTC ☆

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...

Scenario #3: Manual Discovery

← Market View

SORT BY...

Currently: Alphabetical

AAPL	\$99	Additional
ABNT	\$37	Info.
ACAA	\$14	goes here
ADT	\$151	as chosen
AEK	\$0.31	by the
AFL	\$1.90	user.
BAE	\$478	☺

← Sort By

Alphabetical

Price

YTD Earnings

YTD Earnings Growth

Economic Value Added

Daily Trade Volume

← Market View

SORT BY...

Currently: Price

Ticker	Price	YTD Growth
BKA	\$998	+ 9%
CJS	\$891	+ 2%
XAT	\$879	- 1%
NBC	\$876	+ 11%
WAL	\$870	+ 6%
AZT	\$852	+ 32%
...	\$831	- 14%

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Fundamentals Price Chart

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○○○

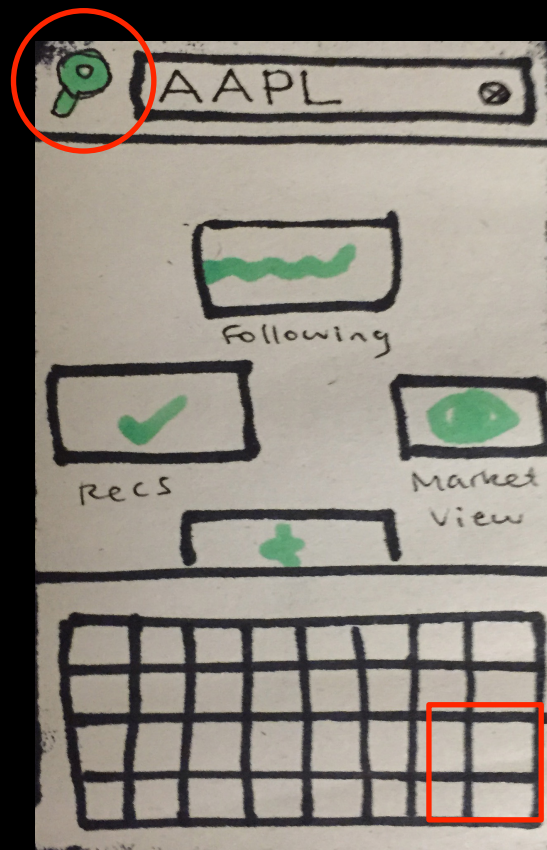
Experimental Method

Interviewees, following a brief introduction, are handed a mobile device with the POP version of InvestorScope loaded on it.

They are then asked, to perform the three tasks, in order ascending in difficulty. The tasks are timed and observed. All throughout, comments are encouraged.

Results – Room for Improvement

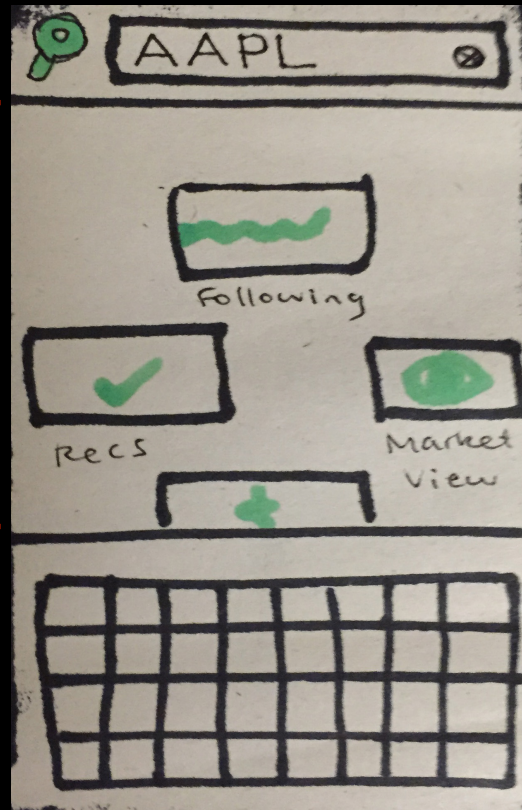
1. Multiple users didn't know what to do to confirm a search. Needs to be clearer.



Results – Room for Improvement

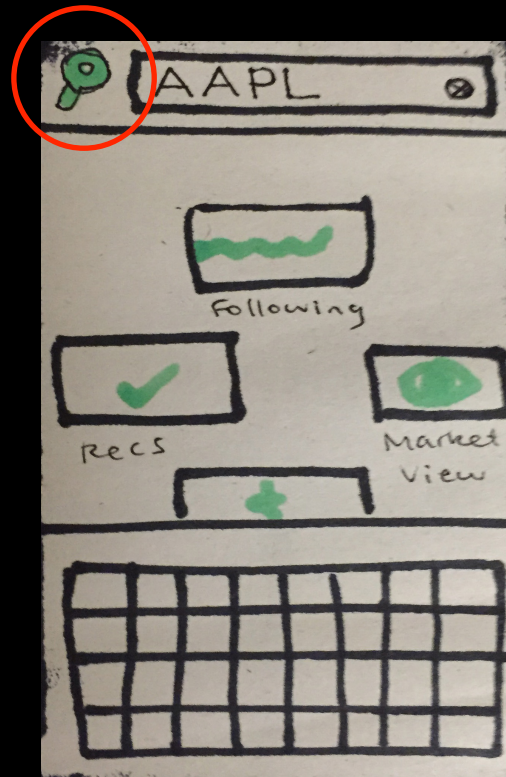
2. Make the homepage *feel* like a homepage; users expressed uncertainty when asked to return to the homepage.

Overly-visual, doesn't feel like enough substance. Perhaps a welcome message is needed or even a complete redesign.



Results – Room for Improvement

3. Lose the magnifying glass button entirely – every user found it counter-intuitive to push, some found it visually distracting or off-putting.



Results – Room for Improvement

4. More metrics with which to sort/filter chart (eg: green impact, management strength etc.)

← Market View

SORT BY...

Currently: Price

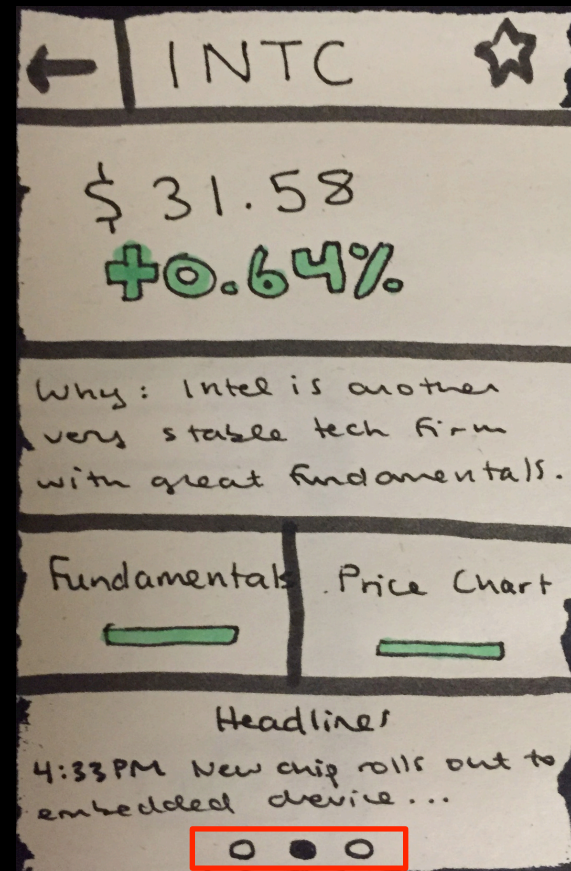
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How can we add more indicators without creating clutter? Similar issue to Landay's Hall of Shame interface in lecture.

Results – Room for Improvement

5. “Bread crumbs” page interface wasn’t intuitive to most of our potential customers. Some tried to click them to get more info.

These buttons may be misleading to some users. Perhaps highlighted numbers or tickers would work better.



Results – Already Promising

1. Question-asking interface was found to be intuitive and enjoyable; one user actually exclaimed out loud that it was awesome.
2. Navigating and using the chart seemed to be very easy for all of the users; minimal complaints and quick understanding.
3. Generally pleasing visual style to the app's UI.

Suggested UI Changes

1. Make searching totally seamless and traditional (eg: built-in “Go” button on keyboard and possibly a “Search” button in the top right).
2. Redesign the home page to allow for more content and a stronger “dashboard” aesthetic.
3. Create a more natural way to scroll through stock recommendations than dots – ticker symbols at or numbers at bottom of screen.
4. Proceed carefully with “swipe” UIs as we were not able to simulate them using POP.

Summary

Overall a very helpful series of user tests.

Clear direction for improvement with various UI glitches as outlined previously.

Strong degree of promise with question answering and recommendation feature as well as non-traditional metrics to look at stocks.

Thank You.