Heuristic Evaluation of Prototypes (Individual)

Problem
InvestorScope presents a mobile interface to gather data/metrics with the purpose of recommending investment decisions through a discovery platform for new equities.

Violations
1. [H2-2 Match Between system and real world]
   Given that the target audience for this app is likely to be unfamiliar with the majority of the stock abbreviations (with the exception of GOOG, APPL, etc…) the number of foreign stock abbreviations disorients users in a way that may discourage discovery and the actionable task of clicking on the company.

   I would suggest that the full name of the stock be displayed (along with the company logo - though I assume that the logos are represented by the circle clipart along the left hand side of the list)

2. [H2-3 User Control & Freedom]
   Upon entering the explore phase, the user is given no accessible route to exit that task and return to the home page. Without a back page, I can anticipate some users getting frustrated with a particularly long questionaire with no way out of the survey.

   I would suggest adding a "Back" button to the explore module in the same way that the search bar included a back button even when searching.

3. [H2-4 Consistency and Standards]
   The UI experience while in the Explore stage seems to be different and a bit unexpected when entering the explore module through the main page. The inconsistent UI flow makes it hard to see how exactly the explore module is tied to the rest of the application.

   I would suggest keeping the color scheme and iOS features that was in the main app and home page even when filling out the questionnaire.

4. [H2-6. Recognition rather than recall]
   The fact that the sorting icons (e.g. sustainability, risk, etc…) at the top need word captions to be understood may potentially be concerning for the user. Though it's true that icons generally provide a higher chance for recognition than a set of links, I would argue that the use of icons is really only effective if the icons are instantly recognizable due to conventions or other intuitive reasons.

   If the icon labels were abstracted out into a textual dropdown menu of possible filters, I feel like that would provide the right level of detail and exposure to the use of these

categories.

5. [H2-10. Help and Documentation]
   The tooltip after submitting the questionaire was helpful, but perhaps too late to explain and encourage users to answer questions to retrieve recommended inquiries. I, personally, was a bit confused why the questions were being asked at the time.

   I might suggest having some sort of concise explanation at the beginning of the survays to explain their purpose so that its not too much of a surprise going into the page flow of the Explore functionality.

6. [H2-4 Consistency and Standards]
   The icons dissapear and then reappear upon searching for a company in the main page's search bar. A user might wonder why it was back on the page after the search was completed, given that the page only displays results of a small subset of companies.

   I argue that a search bar should remain as simple interactive way to welcome people new to the team exactly what new things are being done.

7. [H2-8 Aesthetic and minimalist design]
   Given the list of icons below the search bar, one violation of this particular heuristics in my opinion is that it provides arguably irrelevant information that the user would actually use. I understand how important each of these filtering options were, but I believe the use of that many icons and the number of unfamiliar icon <-> word pairings actually takes away from a generally minimalistic and clean-looking interface.

   I would personally remove the icon bar, but allow users to see in the search result if they were to look up investments by "size" given the ranking algorithm you guys already have.

8. [H2-3 User Control & Freedom]
   To be particular, I can anticipate that some answer responses in the explore module may not necessarily be the user's answers to that particular question. This is a slight violation of the freedom heuristic where the user should be given the option to freely answer in the manner that they wish.

   Obviously, implementing the analysis of freeform answers would complicate parsing and better extraction of concepts in the application - but I think the idea might be something to considered.

Violations Summary

Category	# Viol. (sev 0)	# Viol. (sev 1)	# Viol. (sev 2)	# Viol. (sev 3)	# Viol. (sev 4)	# Viol. (total)
[H2-1: Visibility of Status]						
[H2-2: Match Sys & World]				1		
[H2-3: User Control]		1		1		
[H2-4: Consistency]		1		1		
[H2-5: Error Prevention]			1			
[H2-6: Recognition not Recall]						
[H2-7: Efficiency of Use]						
[H2-8: Minimalist Design]		1				
[H2-9: Help Users with Errors]						
[H2-10: Documentation]		1				
Total Violations by Severity		**4**	**2**	**6**		**12**
Note: check your answer for the green box by making sure the sum of the last column is equal to the sum of the last row (not including the green box)						

Recommendations

Generally, a great looking product and a very well-designed prototypes. I'm going to list some of my insights and recommendations that I gleaned down below:

Seeing the amount of work already done to track the preferences of a particular user, I imagine one extension may be an easy and intuitive way to track and view one's investment portfolio attached to a particular individual's profile. This may be interesting in scaling the product if it was appropriate to actually act on and analyze investments given the ones suggested by this application.

Personally, I don't truly understand the "Best" and the "Recommended" tabs as filter functions. If "best" means the best investment suggestions for your profile, but isn't that what recommended is supposed to do for you? If not (and "best" means more of a financial ranking of the investment) perhaps this distinction between the tabs can be made more clear?

Regarding the disparate roles of the search bar and the icon list, it's of my opinion that if a user searches for a keyword in the search bar, it would be sensible to show relevant results through the search without necessarily having a particular icon to perform that filtering/ranking process for you. Given that investments are tagged with the non-financial parameters, a search might be all that's necessary to intuitively look up a parameter.