



USER RESEARCH REPORT - SEATTLE 2018

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PREPARED BY

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Project Approach

Product design will conduct brief interviews with current customers to gather feedback on common problem areas of the application, as well as some discovery for future enhancements and features for next frontier.

Research Participants

1. Benjamin Cox – Account Executive at NACM
2. Brytni Rysewyk – Star Rentals
3. Chantelle Rottle – North Coast Electric Company
4. Chris Shockley – Credit Analyst at Alaskan Copper and Brass
5. Debbie Deboer – Miles Resources
6. Heidi Lindgren – Senior Credit Manager at Star Rentals
7. Jan Miniti – NACM Business Credit Services
8. Jon Flora – President & Chief Executive Officer at NACM
9. Michelle Achondo – Director of Credit & Billing at American Fast Freight
10. Rebecca Tacavera – Star Rentals
11. Sheri Youngblood – Credit Admin at Harnish Group

BIQ Walk-through

This session was to monitor how users navigate BusinessIQ—and to see what components in the application are most important, and what areas aren't used very much and why.

Notable take-aways.

Dashboard:

- Credit managers and analysts don't use the dashboard at all. I asked multiple participants if they'd like to see any information that would be more useful to them, and all weren't interested.
- When asked if they had the ability to customize the dashboard, would that be useful to them. All said no.
- Some understood the portfolio graph, but most said that they don't utilize this information in their decision making process.

Time spent inside BIQ:

- Most users spend an average of 15 - 30 minutes of their workday inside BIQ, and only spend about 5 minutes pulling a report, in general.
- Most users pull 3 - 8 reports a day.

Search behavior:

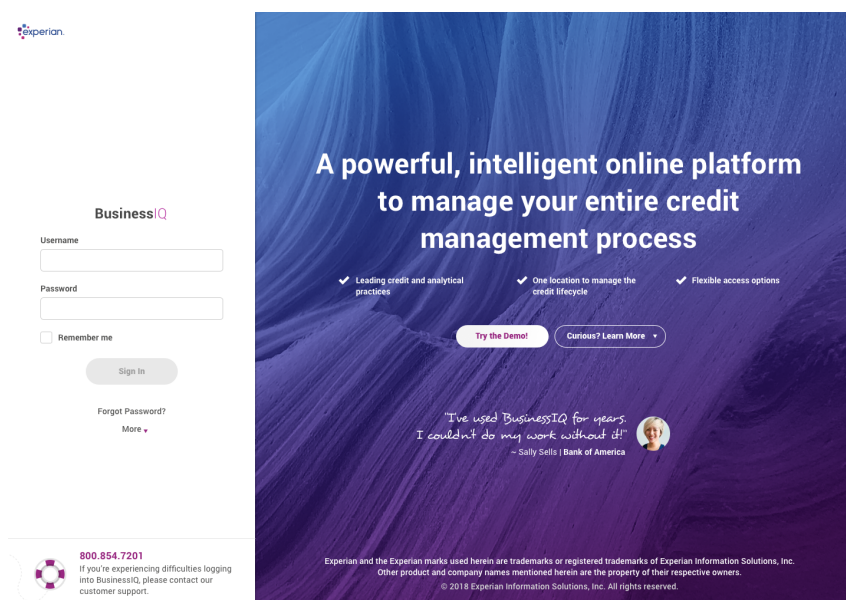
- Users prefer expanded search the most, particularly because they're able to view a company's trade lines, and can compare company results to ensure they're pulling a report from the correct address.
- Most users type business information from a work sheet assigned to them from their employer, which makes sense why—in general—most participants used expanded search for their results.
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Pulling a report:

- On average, users pull reports using the same Premier Profile or Business Profile type out of force-of-habit. They don't know what the other report types mean, or why they would choose them.
- Most users aren't aware of decisioning or alerts, and don't normally click outside of printing and saving a report to either print and attach to their work task paperwork, or email to their boss.
- Typically, users look for tax leans, trade lines, & bank lines of credit within a report. Has been said a few times that this information is most important to them.
- Having a report pull history would be useful. They aren't aware of the recent activity on the dashboard.
- Would love to see if company is privately owned or publicly traded.
- Nobody configures—or knows the difference—between the different report types that can be pulled. Most just keep the current configuration, which has been a split between Premier Profile, Business Profile, or Premier & Owner Profiles. When asked if they ever change this configuration, almost all said no. I asked why; and the answer was they just didn't know the difference between report types.

Next Frontier Concepts Walk-through

This session was to get opinions about some new designs I had been working on. I also assigned some tasks to the participants to see if they understood the new header and search experience.



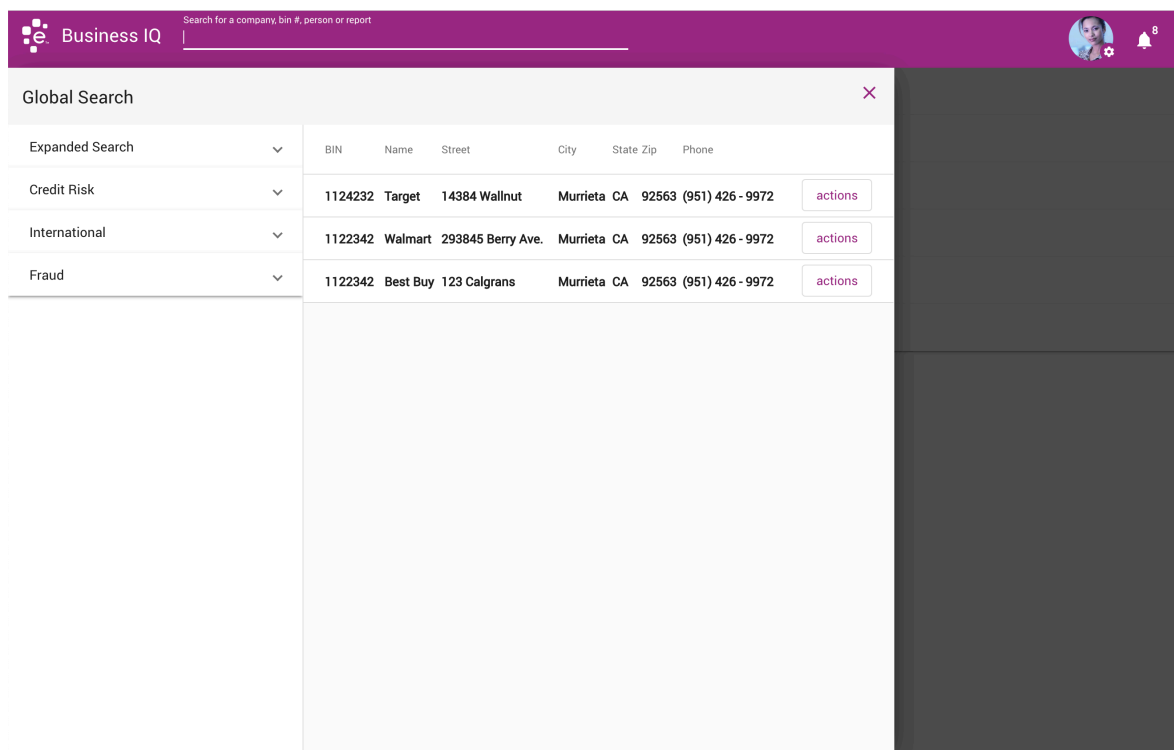
Most positive feedback went to this login design.

• Most common

- feedback was they didn't know it was an Experian page, so the Experian logo needs to be more pronounced.
- Another idea was that other partners could have their own log-in page, with their own support numbers for their customers.

Next Frontier Search Experience

I had asked participants to generate a new report to gauge their response using a new drawer concept for search.



- Everyone but one participant went straight to the top field to conduct a search, and all understood that the drawer contained search results.
- Overall reaction was positive. No one said they didn't like it.
- I asked if the results reflected what they expected, and most said they wanted to see more information per row, such as trade lines, and potentially more address & federal tax ID information.
- Actions were confusing to most.

- Everyone understood the left accordions refined results, but there was a suggestion made that Expanded Search should be open by default so it's more apparent.
- A remark was made that the header should be larger, as well as the search input