

FUND

APPRAISAL – ADDITIONAL INFORMATION

Wireframe Testing

Mar 10th & 11th 2021

Martin Kerr

Anubhav Mittal

Lorna Hayton

Katie Dickerson

What we tested

We tested:

- The Appraisal – Additional Information wireframe
- https://4jd442.axshare.com/#id=pdee0y&p=notifications-b_sign_in&g=1

The screenshot shows the user account page for Scottish Enterprise. At the top left is the Scottish Enterprise logo. At the top right is a 'Sign out' button. Below the logo is a grey header bar with the text 'Your account'. Underneath, there are several sections separated by horizontal lines: 'Account information' (with sub-sections 'Personal details', 'Business details', and 'Identity verification details' which has an 'In progress' status), 'Manage account', and 'Applications' (with a sub-section 'Green jobs' which has an 'Action required' status).

Who we tested with

- **We tested:**
 - **4 potential customers**
 - **Using Video calls (Microsoft Teams)**
 - **10 UserZoom online un-moderated sessions**

What we were trying to learn

- Do labels (Attention Needed etc...) show enough detail
- Display or hide sections
- Should we hide sections that don't need attention
- Is Text Pattern clear enough (Appraisal comments etc...)
- Application Evidence (Upload new file as an update post appraisal comments)
- Thoughts on Additional Information section
- What people expect to see when they SUBMIT

Recommendations

- **Change the IDV **In Progress** label language**
- **Make Appraiser Comments more explicit (Quotes pattern etc...)**
- **Make the “Upload Additional Evidence” link more prominent on the “Additional Info” page**
- **A/B test:**
 - **Hiding completed sections**
 - **the SUBMIT action**

Labels

- The **In progress** label needs to be more explicit about WHO it is in progress with.



Sign out

Your account

Account information

[Personal details](#)

[Business details](#)

[Identity verification details](#)

In progress

[Manage account](#)

Applications

[Green jobs](#)

Action required

Hide Sections?

- Some people wanted the completed sections shown, as a record
- Some wanted them hidden to make the screen cleaner

The screenshot shows the 'Update your application' page on the Scottish Enterprise website. At the top left is the Scottish Enterprise logo, and at the top right is a 'Sign out' button. The main heading is 'Update your application', followed by a message explaining that appraisers have requested additional information. Below this is a link to call for help. A '< Go back' link is also present. The page is divided into three main sections: '1. Before you apply', '2. Your application', and '3. Additional information'. Each section contains a list of sub-sections with their completion status. A 'Submit' button is located at the bottom.

Scottish Enterprise Sign out

Update your application

Our appraisers have requested additional or updated information from you to continue processing your application. This may be because some information is missing or incorrect. You'll find more information in the appraiser's comments.

If you need any help providing the requested information, you can call us on 0300 013 3385.

[< Go back](#)

1. Before you apply

Check your eligibility	Completed
Important information before you apply	Completed

2. Your application

Personal details	Completed
Business details	Completed
About your project	Action required
Public sector funding - de minimis	Completed
Application evidence	Action required
Declarations	Completed

3. Additional information

Additional information	Action required
--	-----------------

Submit

Application Evidence

- **Appraiser Comment could be more obviously personal**
- **They could be more explicit**
- **There was no strong desire to remove existing documents**

Application evidence

Our appraisers have requested additional or updated information from you to continue processing your application. This may be because some information is missing or incorrect. You'll find more information in the appraiser's comments.

If you need any help providing the requested information, you can call us on 0300 013 3385.

[< Go back](#)

Appraiser comment

Your annual accounts don't contain your most recent financial year. Please provide annual accounts that include details up until your last year end

Annual accounts

If your company is less than 3 years old, provide whatever accounts you can.

Annual accounts.pdf

[Remove](#)

[Upload new document](#)

Can't provide this information?

If you're not sure what we're looking for or don't have the evidence we've asked for, please add a short explanation for our appraisers to review.

1000 words

[Confirm](#)

Application Evidence

- **Appraiser Comment could be more obviously personal**
- **They could be more explicit**

Appraiser comment

Your annual accounts don't contain your most recent financial year.
Please provide annual accounts that include details up until your last year end

Annual accounts

If your company is less than 3 years old, provide whatever accounts you can.

Annual accounts.pdf

[Remove](#)

[Upload new document](#)

Application Evidence

- **Appraiser Comment could be more obviously personal**
- **They could be more explicit**

“

Your annual accounts don't contain your most recent financial year. Upload a new version of your accounts with the most recent financial year (up to teh last year end) included.

”

Martin Kerr, Pretend Appraiser

Annual accounts

If your company is less than 3 years old, provide whatever accounts you can.

Annual accounts.pdf

[Remove](#)

[Upload new document](#)

Additional Evidence

- **Appraiser Comment could be more obviously personal**
- **1000 words is an ambiguous phrase**
- **Upload Evidence could be more obvious**

Additional information

TODO: content

[< Go back](#)

Appraiser comment

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation.. Ut enim ad minim veniam, quis nostrud exercitation.

Additional information

Default text - Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation.

1000 words

Can't provide this information?

If you're not sure what we're looking for or don't have the evidence we've asked for, please add a short explanation for our appraisers to review.

1000 words

Appraiser comment

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation

Additional evidence

Default text - Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna [Upload additional evidence](#)

Submit



Sign out

- **Currently, Submit sends you to a ThankYou page with a reference code.**
- **The code was welcomed, and it raised confidence in the submission**
- **Some people wanted a summary before this stage**

Thanks for providing the requested information

Your reference number is still:

111-111-111

This will let us continue processing your application. We'll be in touch if we need any more information from you.

In the meantime, if you'd like you'd like to speak to someone about your application, you can get in touch on **0300 013 3385** and quote your reference number.

[Return to account](#)

Results Summary

- The labels worked well
BUT
On “Identity verification details” the In Progress Label was ambiguous. Customers did not know if it was In progress with us or should they still be doing something
- It is an even split between wanting inactive sections hidden vs Showing them to show what has been completed
- Application Evidence:
 - Appraiser Comments could be more obvious that they are from a person.
 - The Appraiser comments could reference the page better. This would include being more specific about uploading files etc...
- The Text Pattern on Additional Info page works quite well
BUT
The Upload additional evidence was missed often.
- The Additional Info section was most welcome
- When customers SUBMIT it is an even split between showing a summary first or going straight to a thankyou page

fin