

Venmo Recurring Splits- Usability Testing

PLAN

Number of participants: 5

Testing Flow: Create a Group, Add a Recurring expense, Edit same expense

Methodology:

- Moderated test via Figma prototype
- 3 Tasks

Success/Failure metric per task:

- **Success:**
 - At least 50% of participants rate the task as Easy or Very Easy
- **Failure:**
 - At least 50% of participants rate the task as Difficult or Very Difficult

Hypothesis:

- Based on updates made to design from previous testing, it will be easier for users to find the Groups feature and create/edit an expense within their group.

Goal:

- Ensure users can quickly and intuitively move through the flow of creating a group and recurring split expenses within that group.

Objectives:

- Determine if the information within split group expenses is logically organized, easily found, and matches users' mental models

SCRIPT

Thank you for participating in this short usability test for a new feature within Venmo. This is a testing prototype, so some areas of the prototype may not be accessible. You'll be going through 3 short tasks, and I'll ask you quick follow up questions after each task. Do you have any questions?

RECORDING CONSENT: *May I record our session for later reference?*

Link to proto:

<https://www.figma.com/proto/reIKi7gVgJkNfPL4zcJpzA/Venmo---Add-a-Feature-Capstone?page-id=52%3A1009&node-id=188-684&viewport=560%2C270%2C0.04&t=VG5RSDBWxPxhiL0Q-1&scaling=scale-down&content-scaling=fixed&starting-point-node-id=188%3A684&show-prototype-sidebar=1&hotspot-hints=0>

Task 1: *Create a new group with Rick Mitch and James Bridges and name it 'Roommates'.*

How would you rate how easy or difficult it was to complete this task?

- Very Easy
- Easy
- Neutral
- Difficult
- Very Difficult

Task 2: *Add an indefinite recurring expense called 'Rent' within your 'Roommates' group. It should be split evenly, due on the last day of the month, with reminders for 'On Due Date' and '1 Day Before'.*

How would you rate how easy or difficult it was to complete this task?

- Very Easy
- Easy
- Neutral

- Difficult
- Very Difficult

Task 3: *Edit your existing 'Rent' expense in your Roommates group to change the amounts for Rick to \$600 and James to \$1000.*

How would you rate how easy or difficult it was to complete this task?

- Very Easy
- Easy
- Neutral
- Difficult
- Very Difficult

Follow up questions:

How would you rate how easy or difficult it was to navigate this feature overall?

- Very Easy
- Easy
- Neutral
- Difficult
- Very Difficult

Were there any areas of the prototype that felt unexpected, difficult, or confusing to understand?

That is the end of our test. Thank you so much for your time and participation.

RESULTS

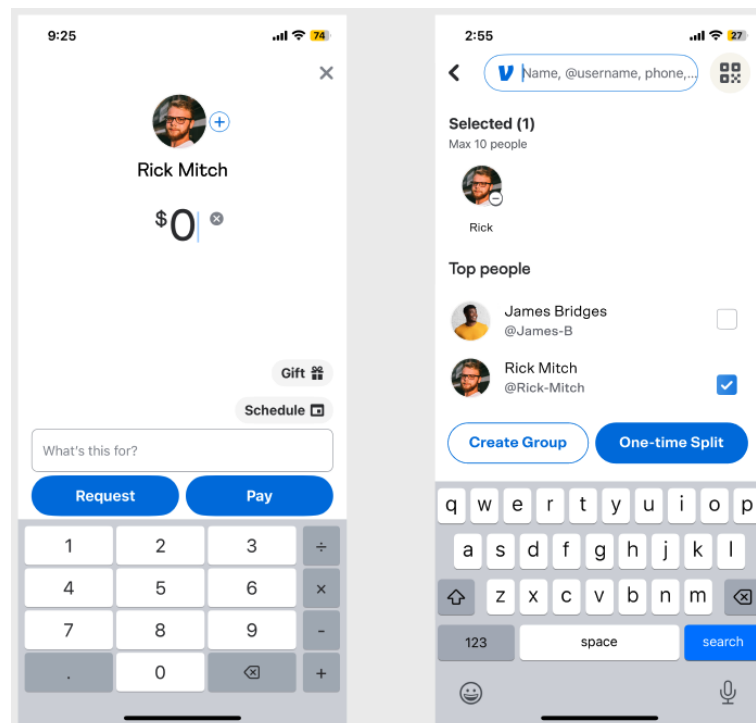
Task 1: Finding Venmo's existing Groups feature

TASK 1					
Rating	Participant 1	Participant 2	Participant 3	Participant 4	Participant 5
Very Easy				X	X
Easy	X	X	X		
Neutral					
Difficult					
Very Difficult					

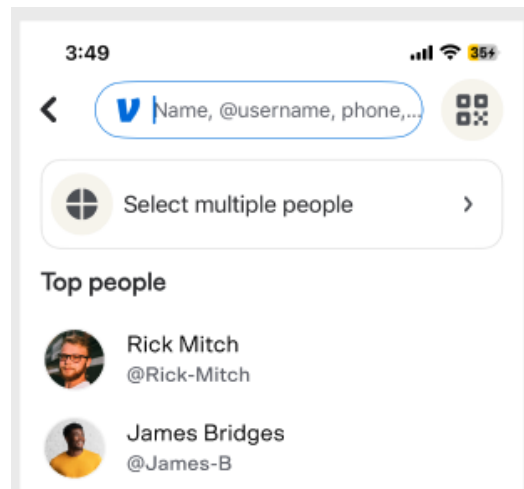
Outcome: **SUCCESS**

Critical Finding: Multiple Valid Mental Models for Group Creation

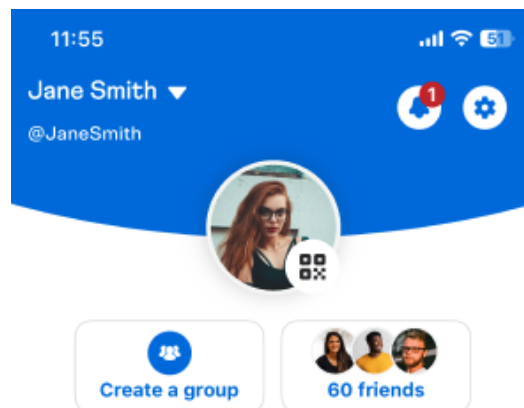
- **5/5 participants explored different entry points** before finding the feature
- 3 distinct mental models emerged:
 1. **Person-first approach (4/5)**: Search for specific people → create group from their profiles



2. **Action-first approach (2/5):** Use Pay/Request button → add multiple recipients → save as group



3. **Settings approach (2/5):** Go to Profile → Create Group (this is the only real entry point for creating a group currently in Venmo)

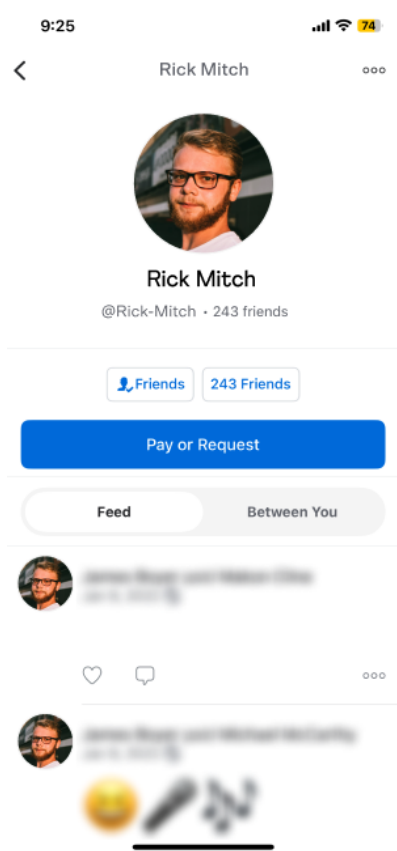


Discovery Patterns:

- Most common first action: Search for a specific person **(4/5 participants)**
- Common exploration sequence: Search → Individual profile → Dot menu (expected group options) → Home → Profile
- **Only 1/5 participants** went directly to Profile to create group

Strong Expectation: Entry Points in Individual Profiles

- **3/5 participants** explicitly tried the dot menu in individual friend profiles expecting to see "Create Group" or "Add to Group" options (the only options in the dot menu currently are Block and Report.)



- Users referenced familiar patterns: "like starting a text message," "like Instagram - send to one person then add multiple"
- Expected to see groups as a friend management feature, not a profile/settings feature

Task 2: Creating Recurring Split Expense within a Group

TASK 2					
Rating	Participant 1	Participant 2	Participant 3	Participant 4	Participant 5
Very Easy		X	X	X	
Easy	X				X
Neutral					
Difficult					
Very Difficult					

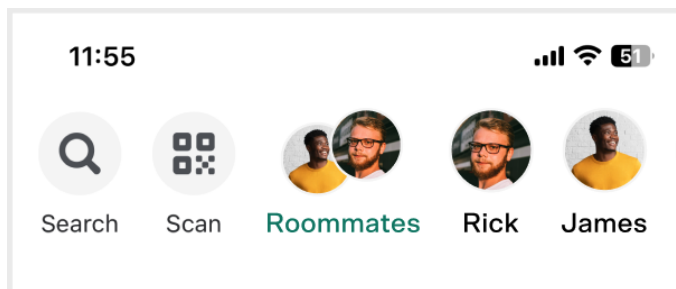
Outcome: SUCCESS

Major Improvement: Strong Task Completion

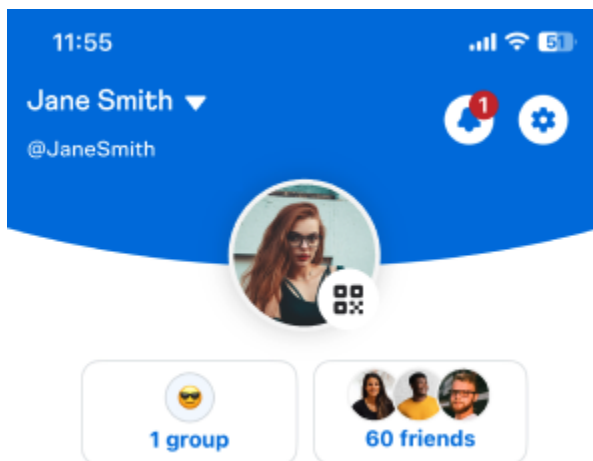
- **5/5 participants moved through the flow easily** once they found the group
- Flow described as "easy," "self-explanatory"
- Significant improvement from low-fidelity testing

Entry Point Discovery:

- **4/5 participants successfully used the Roommates group quick link** in top home navigation (this is not currently a real entry point for existing groups in Venmo)



- **1/5 went to Profile** (didn't see home screen entry point)



Persistent Navigation Issue:

- One participant still didn't see or expect Groups in the top friend search bar in Home

- Expected to access group through member profiles with a "callout that they are in that group"

Task 3: Editing an Expense within a Group

TASK 3					
Rating	Participant 1	Participant 2	Participant 3	Participant 4	Participant 5
Very Easy	X	X	X	X	X
Easy					
Neutral					
Difficult					
Very Difficult					

Outcome: SUCCESS

Excellent Performance: Problem Resolved

- **5/5 participants completed task easily and quickly**
- Complete resolution of 'Edit' discoverability issues from low-fidelity test

Follow-up: How would you rate how easy or difficult it was to navigate this feature overall?

Overall how easy was it to navigate the prototype?					
Rating	Participant 1	Participant 2	Participant 3	Participant 4	Participant 5
Very Easy		X	X	X	
Easy	X				X
Neutral					
Difficult					
Very Difficult					

Outcome: SUCCESS

Learning Curve Observations

First-Time User Experience:

- Multiple participants noted they needed a few mins to learn where everything is in Venmo's interface (all participants had used Venmo before, but never used the Groups feature)
- Once learned, subsequent tasks became easy
- Pattern: Initial exploration/confusion → quick mastery → smooth experience

TAKEAWAYS

Significant Improvements

- Visual hierarchy: No mentions of missed elements or scanning issues
- Group vs Expense confusion: Completely resolved with updated design

Persistent Challenges

- Discoverability of Groups feature (Task 1): Still 5/5 had to explore interface before success
- Multiple entry point expectations: Users expect profile-based access
- Feature awareness: First-time users still need to learn the system

New Insights

- Mental models validated: Person-first approach is strongest (4/5)
- Quick links for groups work but aren't intuitive initially: Users discover them but don't expect groups there
- Learning curve acceptable: Once learned, interface is intuitive

RECOMMENDATIONS

1. Add entry point to 'Create a Group' via individual user profiles
2. Show existing group memberships in individual profiles ("Member of: Roommates, College Friends") or provide quick access to shared groups from profiles
3. Add visual indicators (e.g., group icon, member count badge) to group quick links in Home screen top nav

NEXT STEPS

4. Implement revisions to high fidelity screens
5. Update prototype