

TOOLBOX Nº 9

Product User Experience (UX) Self-Assessment



9 areas to help you evaluate
your company's product and
team performance.

Find out where you are
excelling when it comes to
User Experience.

Discover ways to improve
your customer satisfaction
and increase your ROI.

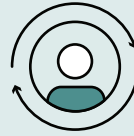
The ROI of a Great User Experience

For every \$1 invested in UX, businesses can expect to see a return of up to \$100*



Improved Customer Loyalty and Revenue

Companies that prioritize UX design can increase customer loyalty and revenue by up to 240%*



Reduce Customer Churn

A 5% increase in customer retention can lead to a 25% increase in profits*



Increase Conversion and Upgrades

A 10% improvement in UX can increase conversion rates by 400%*



Reduce Customer Support and Training Expenses

Companies that invest in UX design can reduce support expenses by up to 90%*

*Sources:

"The Six Steps for Justifying Better UX" - Forrester Research

"Retaining Customers is the Real Challenge" - Bain Consulting

"Improve Customer Experience with UX Investments that Increase ROI" - Interaction Design Foundation

Common UX Pain Points

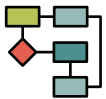
Tell us where it hurts. Related to each area, here are some common pain points that a good UX strategy will help to remedy.



1. UX Fundamentals

"We're not really aligned internally with our product vision."

"Our product team doesn't understand the big picture."



2. Customer Journey

"We have high customer churn."

"We don't know if our product is actually useful for our customers."



3. Onboarding and Guidance

"We're getting too many support tickets."

"Our clients aren't completing onboarding."



4. Navigation & CTAs

"Our users are getting lost on our platform."

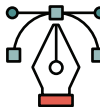
"Our users don't take the actions we want them to."



5. Data Exploration

"Our users don't see the power of our application."

"Our users are getting overwhelmed with the information we give them."



6. User Interface

"Our interface is ugly and outdated."

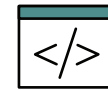
"Our back-end is complex and powerful, but our front-end needs to feel simple and intuitive."



7. Content

"Our customers don't speak the same language we do."

"We have too much content, and it sounds stale."



8. UI Development

"We're not releasing UI features quick enough."

"We're accumulating a lot of technical debt."

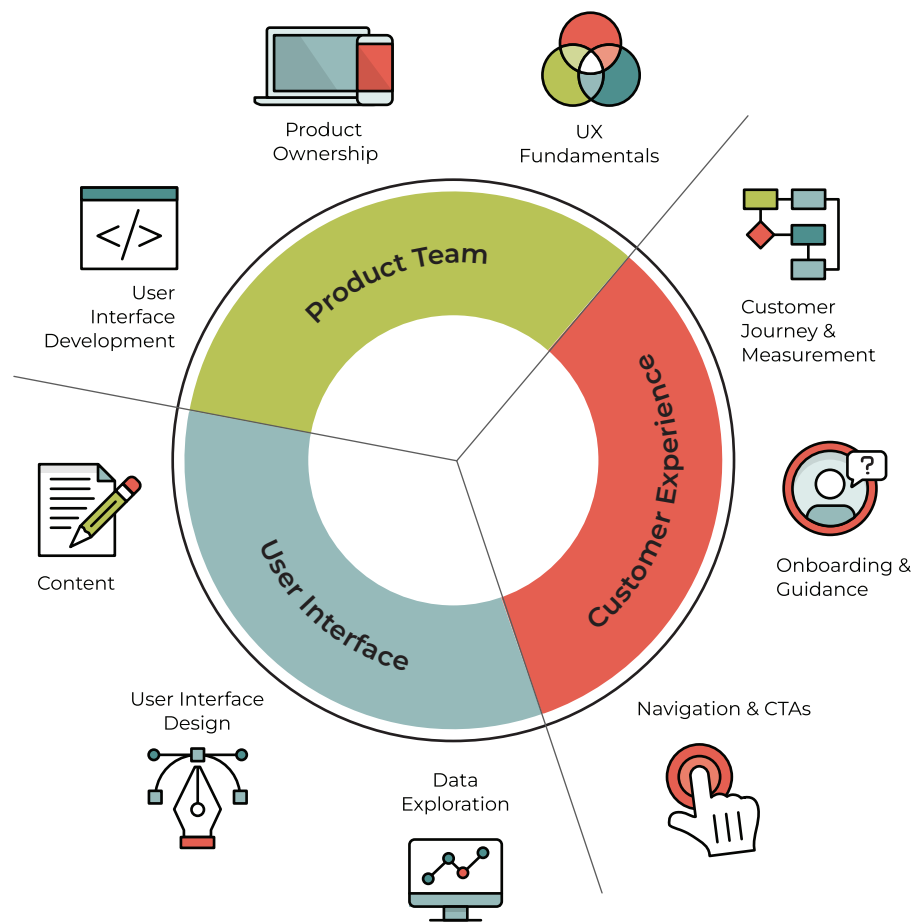


9. Product Ownership

"Customer feedback is not making it to our team."

"Our team doesn't see the value of the efforts we're working on."

Product User Experience (UX) Self-Assessment



How to Use This Assessment

Take the first step in improving the performance of your product with an evaluation based on our experience with hundreds of digital products, industry best practices, and proven UX guiding principles.



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| <p>0. We have <u>no strategy</u> in this particular area. (Leave it blank)</p> <p>1. My team is doing a <u>poor job</u>. There is a lot of room for improvement.</p> <p>2. We are performing <u>below average</u>. There are many things we could do better.</p> | <p>3. My team is <u>meeting expectations</u> at this. We are probably about average.</p> <p>4. We are performing <u>above average</u>. There are still opportunities to improve.</p> <p>5. My team is <u>excelling</u> in this area. There is little room for improvement.</p> |
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1. UX FUNDAMENTALS

A strong foundation supports all of your efforts and determines if your team is productive and engaged. See Appendix to learn more.

UX Strategy

Our UX strategy is captured in a visual format and disseminated throughout the business units and development teams prior to engineering.

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Customer Validation & Prototyping

Our product decisions are based on validated customer needs. We design, prototype, and validate before development.

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Reduced Complexity

We have an ethos of reducing the complexity of our product so we deliver clear and immediate value to our users.

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Data-Driven Decisions

Our customer success metrics are tracked via quantitative analytics and qualitative research is evaluated routinely.

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Clear Customer Benefits

The benefits of our product to our customers are apparent. Benefits are presented or visualized through actionable insights and data-visualization.

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Company Pride

Everyone on our team is proud to demonstrate our platform and can communicate the value it brings to our customers.

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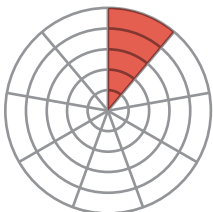
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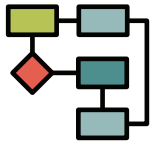
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Added Score:

x 2 =

out of 60



2. CUSTOMER JOURNEY & MEASUREMENT

How well do you understand your customer's journey and have the ability to evaluate the performance of your application?

Customer Journey Mapping

We map each stage of our customer's journey through our software (such as onboarding through customer support), and are aware of the user's goals at each stage.



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Key Metrics

We have quantifiable metrics for each stage of the customer journey we use to identify specific patterns that need optimization.



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User Tracking

We employ user tracking tools (such as Hotjar, CrazyEgg or FullStory) to gain a more in-depth understanding on how customers are interacting with our UI.



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Added Score:

out of 15



3. ONBOARDING & GUIDANCE

First impressions are everything. How your users gain access to your platform and learn how to maximize it will leave a lasting impact on your company's performance.

Onboarding

Our onboarding is a positive experience for our users. We provide the right amount of information to help guide users into our platform and educate them on how our product maximizes their life.



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Out-of-Box Experience

Our product leaves a positive first impression. Empty-states of key views and/or dashboards are populated with teaser or explanatory content to demonstrate the potential of the platform.



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Contextual Guidance

Users can learn how to use the platform and maximize its capabilities with the help of contextual guidance as opposed to external documentation or customer support.



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Progressive Onboarding

Our new users are not overwhelmed. We expose access to advanced features and functionality as users progress through their experience.



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Actionable Insights and Coaching

Our platform provides useful actionable insights and/or coaching on how to maximize the data or content.



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Added Score:

out of 25



4. NAVIGATION & CTAS

Your users should know where they are and where they are going.

Navigation

Our users can easily navigate through the application and do not get lost within the system. We use design patterns that are intuitive to users and guide their primary workflows.



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Obvious Next Steps

Our users always know the next step in our platform to accomplish their goal. Buttons and Calls-to-Action make the desired activity very clear.



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Wayfinding

Our navigation uses terms and verbs that are clear to new visitors. We avoid using words in navigation and buttons that are too generic to understand the intent. We also avoid using terms that are proprietary to our organization that users don't understand.



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5 DATA EXPLORATION

Can your user see the power of your application?

Highlight the Most Important Features and Information

Our links to key content or features are highlighted, driving customers to the most important functional areas of the experience.



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Audience-Based Dashboards & Workflows

We understand the unique goals and needs of personas within our software and experience is not one-size-fits-all. We address the needs of different audiences and provide a direction for users who are unsure of where to begin.



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Interactive Data

Our data can be manipulated, filtered, and/or interacted with so users can see changes based on their input.



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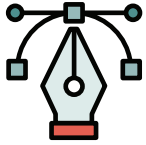
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6. USER INTERFACE DESIGN

Your software is visually appealing.

Visual Consistency

Our User Interface is visually consistent throughout the entire platform. We utilize fonts, sizing, color to indicate varying importance and page hierarchy.



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Design System

We have a documented Design System that allows our developers to generate new views and functionality without having a design team evaluate every feature request.



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Icon/Illustration Library

We have a unique brand by utilizing a well-styled icon and illustration library to draw attention to key areas of the experience and create a unique and memorable visual experience.



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Useful Color Palette

We have an extended color palette which creates a sophisticated appearance and drives visual direction through use of color patterns.



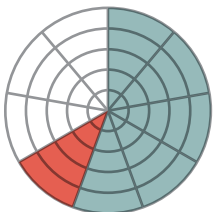
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7. CONTENT

Our content is simple, clear, and straight-forward so a wider audience can understand.

Clear, friendly, and natural language

We use natural language and tone when describing data, providing instructions, and labeling desired call-to-action.



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Error Messaging & Graceful Fails

When users encounter technical issues or user errors they are met with friendly content and helpful information that directs the user to the best course of action in the most appropriate way possible.



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Gradual Reassurance

We guide our users through lengthy processes, such as onboarding, complex processes, or forms.



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Reward Moments

We end multi-step processes with a confirmation of action, and some form of informational reward for their time investment.



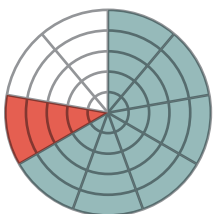
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8. UI DEVELOPMENT

Our development team is committed to a superior User Experience through the use of modern frameworks and UI best practices.

UI Framework

We've chosen the right modern front-end framework for our audience incorporating considerations related to our users' needs, future technology needs, and team capabilities.



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Performance

Our application is fast. Initial page loads, data refreshes, and functionality all performs at a speed that impresses our users.



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Responsiveness

Our UI responds to the various needs of web and mobile devices including special considerations for screen size, device limitations, bandwidth, and environment our users are in.



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Accessibility

Our application is accessible and we use modern best-practices to ensure user's with various needs can navigate and access content and data regardless of visual ability and device limitations.



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Design-Developer Collaboration

Our development and design teams collaborate through the use of communication, design systems, annotation, and constructive workshoping.



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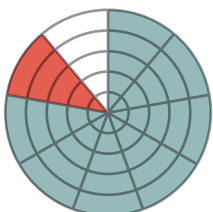
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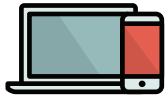


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Added Score:

out of 25



9. PRODUCT OWNERSHIP

We manage the development of our product to maximize existing and future customer needs.

Product Roadmap

We have a Product Roadmap that clearly articulates the short-term and long-term objectives for our product for our customers. We define desired outcomes and customer-driven KPIs for measuring the success of those outcomes.



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UI Specifications

Our specifications are defined for our engineers to ensure our UI development efforts are always focused on delivering features that are intuitive, easy-to-use, and follow established UX best practices.



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Controlled Releases

We have a defined development process that focuses on delivering consistent and stable releases, and has flexibility to incorporate customer feedback.



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Customer Feedback

We have a structured feedback loop that is designed to collect user feedback. Feedback is incorporated into our roadmap to address customer needs.



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Customer Advisory Group

We have a group of trusted customers that we meet with on a regular basis to review our roadmap, provide feedback on their pain points and challenges, and provide early feedback on designs for upcoming features to ensure we are consistently building things that will improve their experience.



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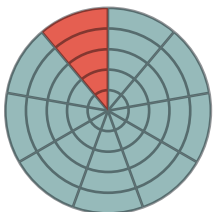
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Added Score:

out of 25

CONGRATULATIONS!

Thank you for taking this Assessment! If any of the boxes are unclear or unchecked, it may be time to consider if you have a sophisticated UX/UI approach to your product experience.

YOUR SCORE

Add up points from each of the 9 sections

POINTS:

p. 1 +

p. 2 +

p. 3 +

p. 4 +

p. 5 +

p. 6 +

p. 7 +

p. 8 +

p. 9 =

TOTAL POINTS:



Ground Floor
0 - 50

User Experience is not currently an important part of your organization. You could use help getting started and formulating a strategy.



Getting Started
51 - 100

Your company has made some efforts to apply User Experience strategy to your products, but there has been little payoff. You may have started to develop a plan, but it still needs a lot of work.



Ramping Up
101 - 150

You have a UX strategy that is well underway. You've considered hiring for a UX position, because it's time for someone to take ownership.



Above Average
151 - 200

UX is an important part of your strategy, but there may still be some loose ends. You likely have someone on your team dedicated to UX.



World-Class
201 - 220

UX is a seamless and integral, if not central, component to your overall business strategy. There may still, however, be areas for small improvement.

Looking to improve your Product Experience?

Toolbox provides User Experience strategy, design, and development services. [Contact us: info@toolbox9.com](mailto:info@toolbox9.com)

UX AUDIT &
PLAYBOOK

UX DISCOVERY
WORKSHOPS

RAPID
PROTOTYPING

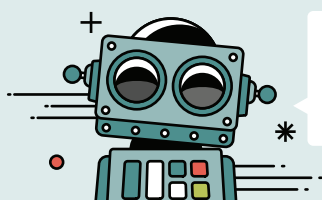
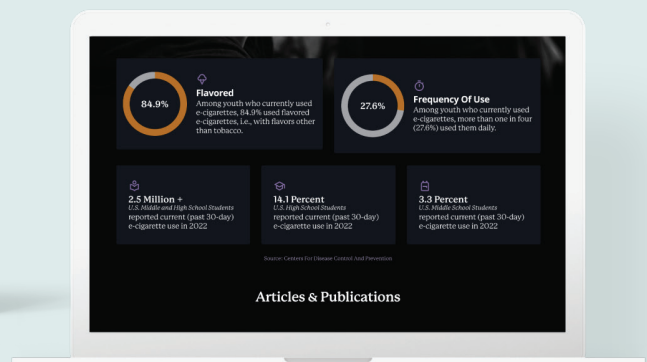
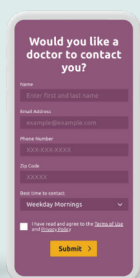
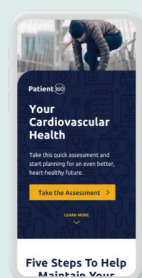
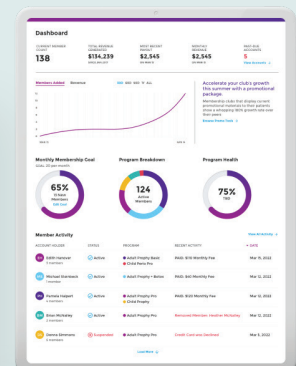
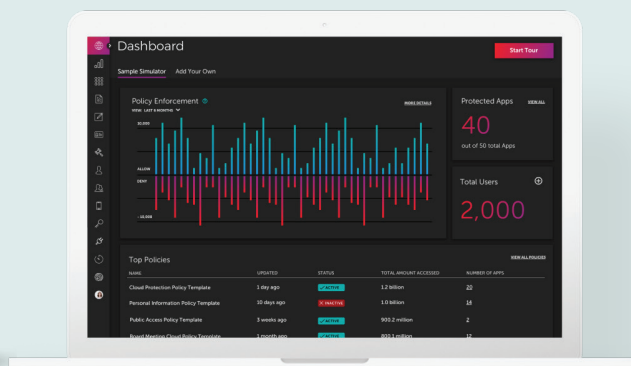
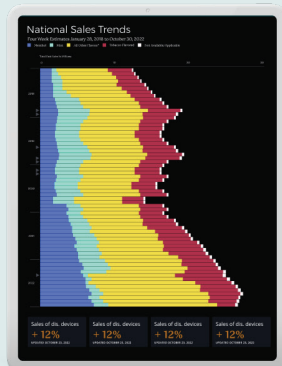
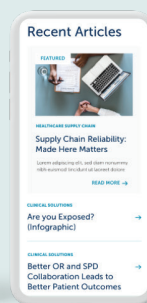
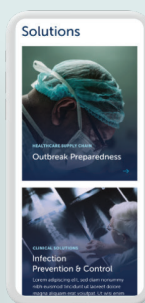
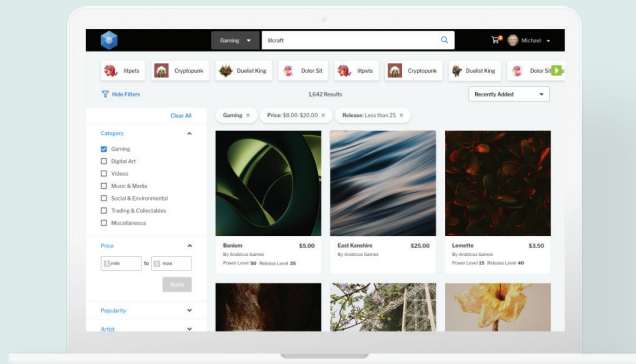
USER INTERFACE
DESIGN

UI
DEVELOPMENT

PRODUCT
OWNERSHIP

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