



UX Research Findings & Recommendations

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- By

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Overview

Opptimise is a decision-support system that leverages behavioral analytics to Optimize people potential, providing Impactful leadership and a more efficient, effective, and engaged workforce. The main goal of Opptimise is assessment and analytics, to improve individual and organizational effectiveness. This document aims to highlight usability feedback for the existing Opptimise portal.

Hypothesis

Poor people-decisions hurt organisations, leading to the following:

- disengaged team leads upto 53% decline in customer experience
- poor leadership leads to a decline in productivity by atleast 5-10%
- cost of a single bad hire costs a whopping \$32300
- disengaged employees lead to reduced referrals by atleast 65%

Business Goal


In view of improvising usability thereby increasing customer base, the goal is to solve current users' pain points, enhance their user experience drastically and thereby increase ROI significantly. This will help in better user engagement to:

- retain existing customers
- increase potential customer reach, preferably the age group of 20-50
- increase ROI significantly

Usability Testing



First off, usability testing was conducted. A total of 3 participants from different demographics were interviewed. A thorough usability exercise was done on the existing site



to understand the main functionalities and its usability. Through this process some basic usability issues and pain-points were uncovered.

Furthermore, heuristic evaluation was performed by three UX evaluators on all four focal points of Design - **Navigation, Content, Presentation & Interactions**.

Key Takeaways

- inconsistent usage of colors and fonts throughout the site
- fonts can be more appealing
- CTA buttons are not visible in the first instant. Also, there is less emphasis.
- layout can be better
- space management can be better – Too much empty space.
- visual elements (icons/highlighters/vectors) can be added where deemed necessary to enhance the overall look and feel of the UI
- instructional overlays should be provided where necessary – information scent is missing
- content management needs an overhaul - the reports have too much information which is painstakingly long, and don't hold user's attention
- there is a lot of motor load, as well as cognitive load for the user. Users did not find the slider option user friendly. Radio buttons are their preferred choice owing it to their current mental model
- questions seem wordy, repetitive, tricky and personal in a few instances, making them hard to decipher

Navigation

Progress bar - Not discoverable at all due to poor visibility. All participants confused the progress bar with the slider. This is a total affordance fail. Participants say,

“How do I know how many questions I need to attempt?”

The screenshot shows a dashboard with a navigation bar at the top right containing 'Dashboard' and a user icon labeled 'DP'. Below the navigation bar, the breadcrumb 'DASHBOARD > QUESTIONNAIRE' is visible. The main content area displays 'Q9' followed by the question text: 'I am receptive to ideas/thoughts that come from the environment, and I am willing to examine them.' Below the question is a horizontal scale with nine labels: 'Completely False', 'To A Very Great Extent False', 'To A Great Extent False', 'To Some Extent False', 'Neither True nor False', 'To Some Extent True', 'To A Great Extent True', 'To A Very Great Extent True', and 'Completely True'. A green slider bar is positioned below these labels, with a white circular handle currently positioned over the 'To A Great Extent False' label. A 'NEXT' button is centered below the slider. At the bottom of the page, a progress bar shows a blue segment on the left and a grey segment on the right, with the text '8 out of 30' on the right side.

Slider - All 3 participants ask:

“Why do I have to drag from one end to another? Why cannot I just have radio buttons instead, as I am familiar and it’s way faster.”

Content Organization

Labels and Grouping can be made more effective for improved user experience. Two participants wonder,

“What is the purpose of Shortname? Is it my nickname?”

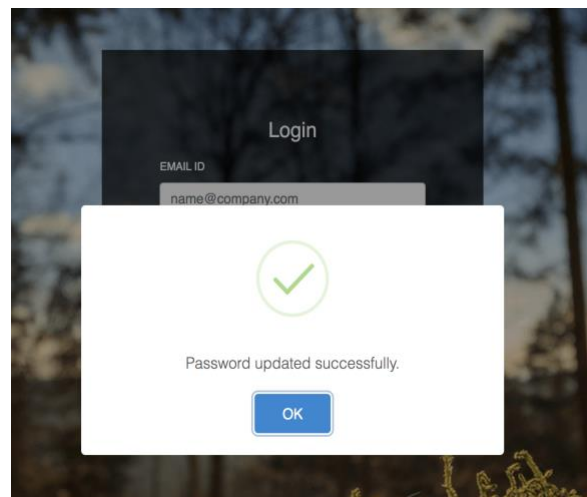
The screenshot shows a 'CREATE PROFILE' form with a black header. It contains two input fields: 'NAME*' with the value 'Deepalli' and 'SHORT NAME*' with the value 'DP'. Below the input fields are two buttons: a grey 'Reset' button and a green 'Submit' button.

A few other questions popped up...

“What is my username?”

“Why should I enter my password first even before I begin?”

“Shouldn’t username be first? Why an additional step?”



Two participants were of the view,

*“Why do we have the **Show Older** button even when there were no invitations?”*

Recommendation - We could add the tabs (**sent/received**) under Invitations.

The screenshot shows a dashboard with two main sections. The top section is titled "LIFE ORIENTATION INSTRUMENT (LOI)" and contains the following information: "Deepall's LOI Self", "Expires on 16-Oct-2020", a progress indicator of three green circles with a checkmark, "Report ready", and a red "VIEW REPORT" button. The bottom section is titled "MY INVITATIONS" and displays the message "You have no new invitations" with a "SHOW OLDER" button below it.

*“What does **My Invitations** mean?”*

*“Why do we need **‘Expired’** information?”*

Recommendation - Rather, this should say **‘Completed’** under a separate section called Completed Assessments.

One participant says,

“The options seem confusing.”

The screenshot shows a questionnaire question Q9. The question text is "I am receptive to ideas/thoughts that come from the environment, and I am willing to examine them." Below the question is a horizontal scale with nine response options: "Completely False", "To A Very Great Extent False", "To A Great Extent False", "To Some Extent False", "Neither True nor False", "To Some Extent True", "To A Great Extent True", "To A Very Great Extent True", and "Completely True". A green progress bar is positioned below the scale, and a "NEXT" button is centered below the progress bar. At the bottom of the page, a blue progress bar indicates the current position, and the text "8 out of 30" is displayed on the right.

Discoverability - Discoverability issue at a few places, and does not convey the required affordance in certain instances. For example, the 3 ovals do not convey the affordability of

being a stepper. One participant thought it was a banner and the content on the screen would move to something else. Also, the participants thought it was clickable.

DASHBOARD > ASSESSMENT



LOI Self ASSESSMENT

DEEPALLI'S LOI Self

Expires in 7 day(s)

Complete your self-assessment

START

Affordance - Participants also kept on clicking on options for selections. They completely failed to notice the slider feature to select an option.

One of the participants wonders,

“Both Slider and Questions scale look like 2 separate elements”

DASHBOARD > QUESTIONNAIRE

Q9

I am receptive to ideas/thoughts that come from the environment, and I am willing to examine them.

Completely False	To A Very Great Extent False	To A Great Extent False	To Some Extent False	Neither True nor False	To Some Extent True	To A Great Extent True	To A Very Great Extent True	Completely True
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Slider: [Progress bar with a slider knob]

NEXT

8 out of 30

Chunking - Chunking of information is less effective, as there are large chunks of data throughout. None of the information is scannable. For example, the Self-Assessment LOI reports seem verbose and lengthy. Participants wonder,

“How many pages are these reports? And, which information is most relevant and important to read?”

People Involvement 7.07

Task Involvement 7.73

Credibility 7.87

YOUR INFLUENCE 7.01

You provide high-level directions and expect people to achieve what you've envisioned. You may find it difficult to assert yourself to keep people focused on your objectives. You are seen as someone who is not aggressive enough to get the team to achieve the set objectives.

WHEN COUPLED WITH THE FOLLOWING VALUES IMPLIES THAT...

→ **EMPOWERMENT** 6.99

You trust people and empower them to adopt their ideas and approaches in carrying out those repetitive or less-critical tasks. To an extent, you provide them with opportunities to explore and learn. When the cost of mistake is high, you tend to micromanage people.

→ **CREDIBILITY** 7.87

You have some motivation to honor your commitments, so you're likely to do what you say you will. People rely on you to an extent, but they may want to keep a tab on your progress.

→ **TASK INVOLVEMENT** 7.73

You understand your job fairly well and may not need a lot of support to execute your responsibilities. However, you may not be seen as being highly engaged with what's going on at work. You manage to guide people to an extent and achieve the minimum quality standards.

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Deepalli : Self Assessment

LOI

→ **PEOPLE INVOLVEMENT** 7.07

You understand people's abilities, aspirations, and sensitivities to an extent. You are fairly appropriate in flexing your style and dealing with them to get things done. At times, people may be confused as to why you chose them for a particular task and push back at you.

→ **ORGANIZED** 8.73

You are well-organized and systematic in work situations. You meticulously plan your activities and organize your resources before executing your tasks. You may find it difficult to get people to work systematically, especially if they are opposed to working in a structured environment.

→ **PRIORITIZATION** 7.19

You assess your work environment fairly well. To an extent, you understand the relevance of your actions to the context, place, and time in work situations. Your efforts to influence people and events are likely to unfold the way you'd expect and possibly have the desired impact.

Content – The way content has been presented in a few instances seem ambiguous for one of the participants. Also, the instructions seem a little too direct and intimidating. For example the phrase “*Drag your slider to mark your answer. Be honest please*” seems to question his/her integrity.

The screenshot shows a questionnaire interface. At the top, it says "DASHBOARD > QUESTIONNAIRE". Below that, it says "Q1" and "I have a lot of ambitions and dreams on what I would like to be and achieve in my life." There is a horizontal scale with nine categories: "Completely False", "To A Very Great Extent False", "To A Great Extent False", "To Some Extent False", "Neither True nor False", "To Some Extent True", "To A Great Extent True", "To A Very Great Extent True", and "Completely True". A green slider is positioned over the "To A Great Extent False" category. A modal box titled "STEP-2" is overlaid on the slider, containing the text "Drag the slider to mark your answer. Be honest, please!" and buttons for "Skip", "Back", and "Next (2/3)".

A few other content related concerns include,

“Why are questions so lengthy?”

“The choices seem complex. By the time I read the responses and comprehend them, I forget the question!”

“Why are personal questions being asked?”

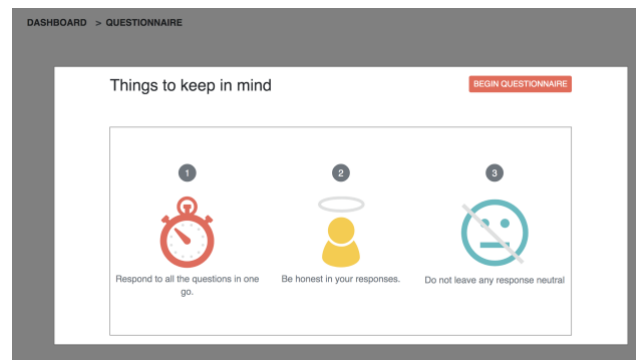
Question Numbers	LOI Questions
1	I have a lot of ambitions and dreams on what I would like to be and achieve in my life.
2	I avoid expressing my feelings, emotions, and thoughts in my relationships.
3	I find it difficult to influence people and events to move in the direction I want.
4	I am curious to know why things happen the way they happen
5	I am outspoken and frank in sharing my thoughts and opinions.
6	I take the responsibility for converting my ambitions and dreams into reality.
7	I accept people as they are in my relationships.
8	I find it difficult to empower people while at work.
9	I am willing to examine the ideas and opinions that come my way objectively.
10	I fail to take care of people's feelings and emotions when expressing my opinions.
11	I avoid putting in extra efforts when exploring options available to achieve my ambitions.
12	I take responsibility for my relationships and their growth.
13	I ensure there is no gap between what I say and what I do while at work.
14	I don't put in any extra effort in creating learning opportunities wherever possible.
15	I stand by whatever I say under all circumstances.
16	I get into details and gain clarity when working on any task.
17	I understand the feelings and emotions of those involved in my relationships.
18A	I get into details of my job and have a clear understanding of all the related aspects.
18B	I understand each person who works with me and I am aware of his/her potential.
19A	I understand and gain clarity on whatever I learn.
19B	I apply all my learning in real-life situations.
20	I allow my opinions to be easily influenced by my environment.
21A	I am not organized and systematic in achieving my goals.
21B	I miss getting things done at the right time in achieving my goals.
22	I fail to understand the importance of when to do what in my relationships.
23A	I am organized and systematic while at work.
23B	I understand the significance of context, place, and time in all my transactions while at work.
24A	I am organized and systematic in my learning.
24B	I find time to keep my learning ongoing.
25	I take care of when to say what when sharing my opinions.

Presentation


Layout - Space has not been used effectively. Too much empty space.

Colors and shading - Colors are not drawing the user's attention or emphasizing the significance of the content. Participants wonder,

“What is the purpose of having so many colors?”



Poor affordance - In the above screen, the participants thought this was a question format of the questionnaire. They didn't realize this was an instruction as they missed reading, *“Things to keep in mind”*. Also, they completely missed noticing the BEGIN QUESTIONNAIRE



button on top because of excess usage of colors. Participants also feel there is no emphasis on any CTA in the Dashboard screen. They did not understand what is, and is not clickable. Affordance is missing.

Interaction

Recommendations - Aided data entry, i.e. preselected defaults are not provided effectively. This experience can be improvised by providing proper instruction overlays at every step.

One participant says,

*“The option, **Neither true nor false**, doesn't detect in one go. I need to move the slider back and forth to make that selection”.*

Another participant asks,

“Why cannot we have numbers instead of such length options, say 1 to 10.”?

The Solution

Based on the above steps, possible design and content changes were recommended and communicated to the Stakeholders in order to align with the business and budget. This was followed with multiple interactive sessions with the respective teams (Dev and BA). Based on the existing flows, I defined user journeys and assumptions, and sought for further inputs from the client.



User Stories & Assumptions

1) User engagement via Social Media

Assumption:

User views the advertisement on Social Media Channels (LinkedIn/Instagram etc) and learns about [Opptimise](#). User is curious to know more and wants to explore. User clicks on the Ad which then takes him/her to the [Opptimise](#) Website Public Portal.

Recommendation:

Public site should display [Signin/Signup](#) information along with information about the Company in the form of banners.

2) Signup Page -> Register Page

Assumption:

User enters information in the Signup Page and proceeds to the Register Page. Fields such as Username, Password, Confirm Password, DOB/Age Group, Profession, [Organisation details etc](#) can be captured.

Recommendation - Should users be able to pull data through Social Media Channels instead of entering them manually? For [example](#) via [LinkedIn](#) or [Facebook](#)

3) Dashboard - Freemium

Assumption:

User lands in the Dashboard page displaying Summary along with other [Tabs](#) - [Dashboard](#), [Questionnaires](#), [SWOT Analysis](#), [Team Analytics](#)

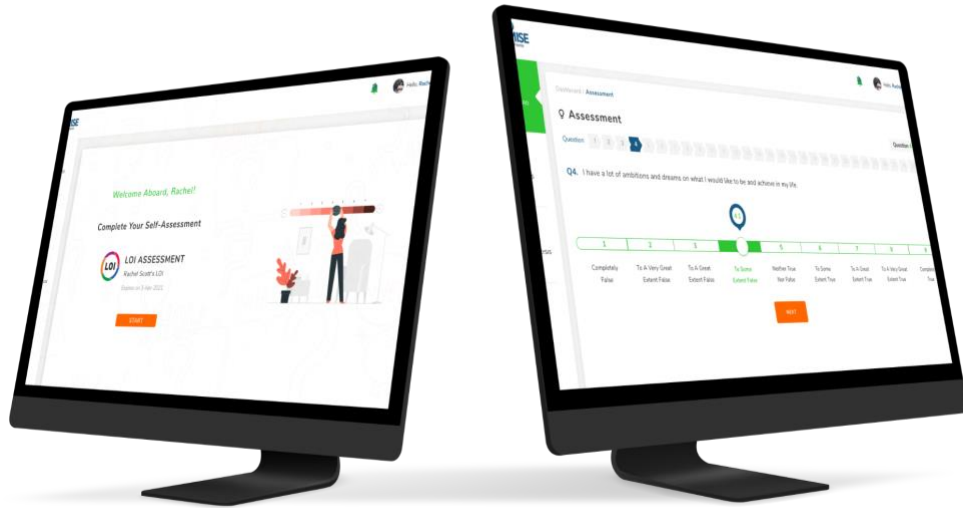
Recommendations:

1. Can we show analytics on this page?
2. We can display locked features, Content as well - we show some content and then lock the rest of it. Like for example how Medium does.
3. We can display Freemium/Premium status on the navigation bar

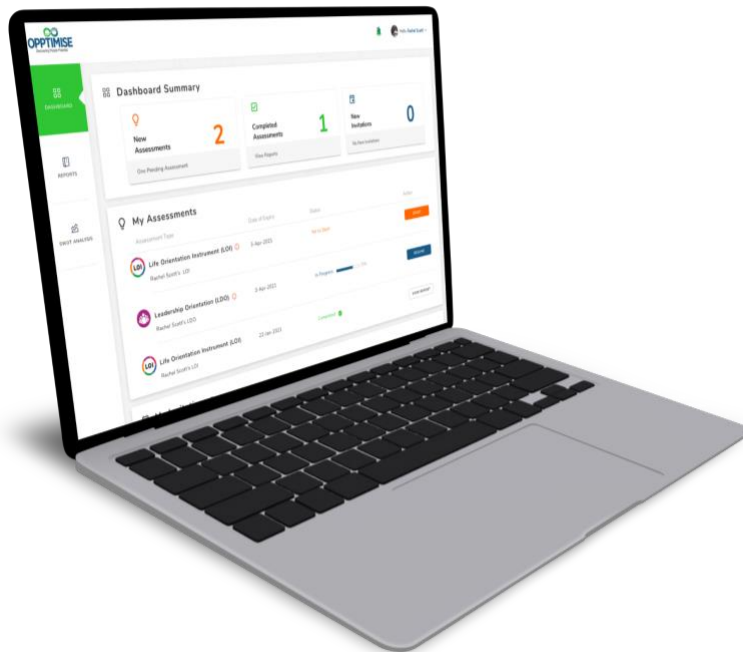
Prototyping



All of the changes have been implemented, and were further tweaked and handed over to the development team.



Mockups of the Optimise - Assessment flow



Mockup of the Optimise - Dashboard flow

Results



A prioritization exercise of all the recommended changes were done, and all suggested design changes were incorporated. The recommendations are currently being implemented by the Dev Team and is ready for testing.

- Simplification of screens with redesigned visual aspects that were confusing such as icons, images, labels, highlighters, content, colors, space etc. have been implemented.
- Various other content elements that were ambiguous have been redesigned and implemented.

To learn more about Optimise, hop on to: <https://www.letsopptimise.com/>