Usability Testing: Remote Moderated

DemocracyLab: User Flow for Creating a Project

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Introduction

After reviewing the current process to Create a Project in Figma, Democracy Lab's UX designers commented on a number of potential friction points.

Usability testing was performed to confirm these potential issues and identify any other challenges that our designers might have missed.

The goal is to present these findings, along with recommendations for improvements that can increase the usability of this process, which will in turn increase the conversion rate of created projects.

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[1] The current conversion rate of users who begin the Create Project user flow is 5.6%[1]. This number is based on data from Heap.io[1] of users who started the 'Create Project' user flow and made it to the 'My Projects' page. *See appendix.*

Testing Objective & Methodology

Testing Objective

- Discover potential friction points for users during the CREATE PROJECT user flow in order to improve usability and **increase conversion rate of process.**

Methodology

- Remotely moderated tests were administered via video call, with participants asked to create a project on the DemocracyLab website.

- These findings were matched against comments from DemocracyLab UX Designers[1] to compile findings[2].

[1] Taken from comments on the Research: User Flow page of the shared DLab Figma file.
[2] Also included: Results and comments from usability testing performed by Luba and Alena on the 'Resources' page of this user flow.

Participants

A total of 13 participants were tested between 3/14/2021 and 4/30/2021.

10 participants were identified as "less technical" users, while 3 participants qualified as "more technical" users.

Throughout the report, these user personas will be referred to with these icons: LT MT

Designers also commented on this user flow and will be noted with this icon: UXD

Less Technical Users LT

Gender	Age	Profession	Country
Female	30	Librarian	Croatia
Female	28	UX Student	Norway
Male	45	Graphic Designer	Germany
Female	31	UX Student	Germany
Female	30	UX Student	Spain
Female	40	UX Student	USA
Female	30	UX Student	USA
Female	38	Speech Language Pathologist	USA
Male	34-44	Sr, Consultant	Germany
Female	35-44	Marketing/PM	Canada

More Technical Users MT

Gender	Age	Profession	Country
Male	44	Web Developer	Hungary
Male	25-34	PM/CTO	Canada
Male	46	Founder & CEO	Malaysia

Findings

A number of our designers' initial findings were confirmed through testing, along with new issues introduced by testers, for a total of:

4 High Priority Issues

5 Medium Priority Issue**s**

5 Low Priority Issues

Findings: By Priority

High Priority

1. Required/Optional Fields: Clarification
2. Error Messages: Inline validation
3. Resources: Clearer messaging
4. Review/My Projects: Clearer messaging

Medium Priority

1. Progress Bar: More description, clickability
2. Create Account/Log In: Users should be brought back to Create Project flow
3. Start > Image: More guidance, lessen prominence, improve editing
4. About pt. 1 > Tech Used: More explanation, guidance
5. Review: Edit option

Low Priority

1. About pt. 1> Org Type: More explanation, guidance, localization
2. About pt. 2 > Actions: Add guidance, clarification
3. Roles Needed: Missing 'Other'
4. Roles Needed: Request for sample description templates
5. Review: Save for later option

What is included on each slide

ISSUE noted by testers and UX designers.

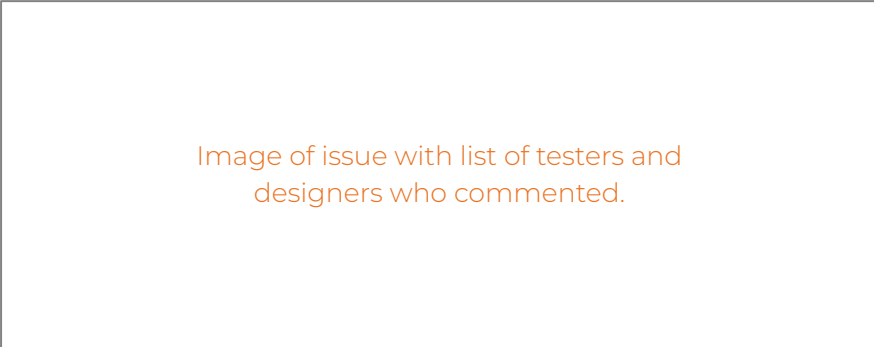RECOMMENDATION based on feedback, knowledge of DLab site, and UX best practices

Image of issue with list of testers and designers who commented.

Related heuristic, based on those listed in the appendix.

Related User Feedback

Quote from (or observation of) tester related to issue.

Quote from (or observation of) tester related to issue.

Quote from (or observation of) tester related to issue.

LT MT *Note of which tester(s) commented on issue.*

UXD *Note that UX designer(s) commented on this issue.*

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High Priority: Required/Optional Fields (Throughout Process)

ISSUE: Users were confused over which fields were required and which were optional, for every step.

RECOMMENDATION: Implement consistent, visible notation for required/optional fields throughout flow.

Project Name

Issue Area

Select...

Short Desc

0 / 140

Required fields on first step are listed as bullet points on the bottom of page. They disappear as each required step is completed.

Give a one-sentence description of this project

☐ I have read and accepted the Terms of Use
- Please enter Project Name
- Please enter Project Description
- Agree to Terms of Use

Let others know what your project is about...
You can always change details about your project later.

Country

s, city, or zip

No note on whether fields are required or optional.

URL

Project Stage

Select...

Organization Type

Problem*(Example)

0 / 1000

Describe the problem your project is solving...

This step uses an asterisk to note a required field.

*Required

Related heuristic: [Consistency & Standards]

Related User Feedback

"Usage of asterisks for required fields is inconsistent."

He did not notice the difference between the required and the optional fields.

She is not sure which fields are optional and which fields are required.

"It would be nice to know if the form fields are optional or required."

"Required and optional fields are not clear."

(LT) (MT) *Both user personas commented on this issue.*

(UXD) *DLab UX Designers commented on this issue.*

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High Priority: Error Messages (Throughout Process)

ISSUE: Users did not see error messages, were confused when they couldn't move forward. Did not know how to how to fix errors.

RECOMMENDATION: Use inline validation in red (or other visible color) instead of black bullet points at bottom of page) with descriptive guidance to remedy issue.

Error is noted at the bottom of the page (in black) instead of in a more visible color, next to the related field,

Related User Feedback

Prefers different colored inline validation. Bullets are also confusing whether or not this is an error message.

Didn't notice the error messages until she enter all the info. She prefers inline validation and different color for the error messages.

Sees error message about needing a valid URL and tries to remedy the error by adding to Project Links.

Later saw the error about needing a valid URL. Thought it should've been mentioned earlier, in red, closer to field.

Didn't notice the error message. It is far away from the field that it is referring. "Black means it's not important."

**LT** **MT** *Both user personas commented on this issue.*

UXD *DLab UX Designers commented on this issue.*

Related heuristics: Error Prevention   Help Users Recognize, Diagnose, and Recover from Errors

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High Priority: Resources

ISSUE: Users were not sure if fields were required or optional. They were confused by some fields (e.g., code repository) and the format that was required (URL, tool name, handle?) The section for project links and files added more confusion for some. Overall, they want more guidance on what all of this will be used for.

RECOMMENDATION: Clearly explain what each field is asking for and the information requested, esp. if format is important (URL vs name).
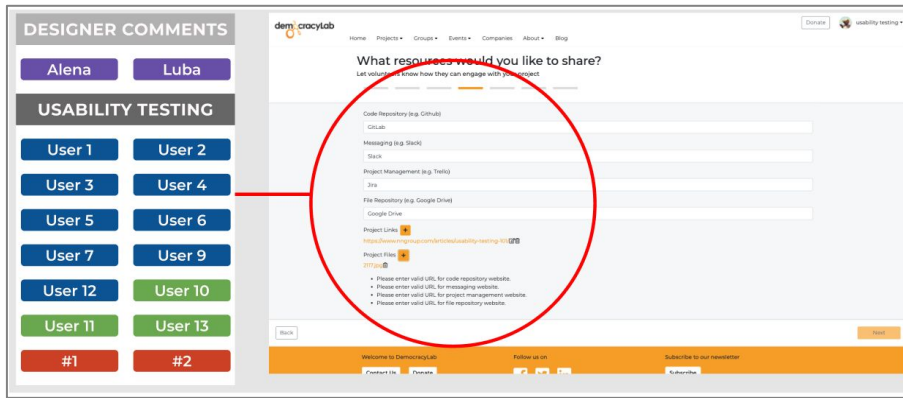
Related heuristics: Error Prevention   "Don't make me think."

Related User Feedback

He does not know what to write into the code repository form field. Some description about what this field is about would be nice. What does repository mean?

She says that it is not clear that if the input fields are for the name of the tools or the links to the relevant pages on those apps. Slack or slack channel?

He does not know what to write into the messaging form field. Do I need to write my Slack name?

Is this project management field asking me what sort of app I use or the link to the my project in that app?

She is not sure which kind of project files to be upload.

LT MT *Both user personas commented on this issue.*

UXD *DLab UX Designers commented on this issue.*

High Priority: Review & My Projects

ISSUE: Users were confused to see 'Unpublished' after clicking a 'Publish' button, and they did not see messaging about the review process or next steps.

RECOMMENDATION: Improve overall visual hierarchy. Change Review page CTA from 'Publish' to 'Submit' or similar. Communicate review process more clearly. After creating a project, show a more visible success message with info on next steps.
Change Status on My Projects from 'Unpublished' to 'Under Review.'
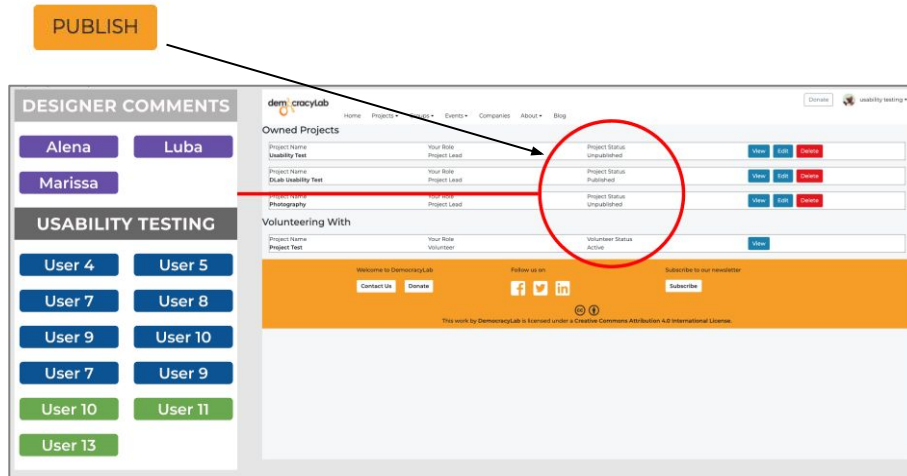
Related heuristics: Consistency & Standards | Match Between System/Real World | Visibility of System Status

RELATED USER FEEDBACK

Suggested a different term instead of 'Publish' or that the status say "under review" instead of "unpublished".

Would have preferred a message that said the project was being reviewed before it would be published. Or a note explaining that under 'Unpublished'.

Didn't see a message that said the project would still need to be reviewed. Wanted info on next steps.

Clicked Publish but was confused by Project Status saying Unpublished. Went back though each step to see where he might have made a mistake.

Wanted some feedback on the status of the project once "published". Would he get an email?
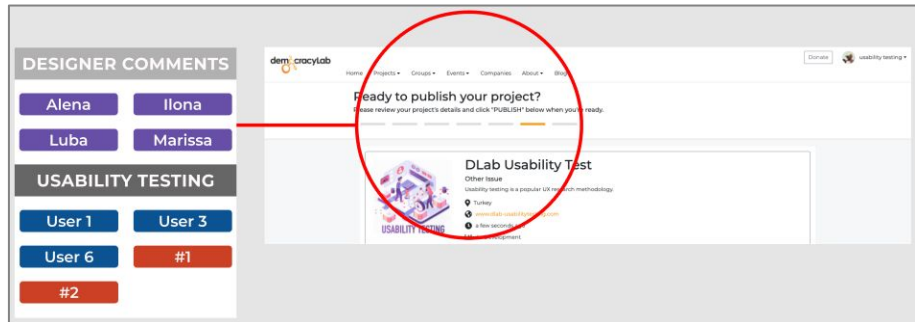
LT **MT** *Both user personas commented on this issue.*

UXD *DLab UX Designers commented on this issue.*

Medium Priority: Progress Bar

ISSUE:	Lacks functionality (steps are not clickable) and details. Users want more guidance and transparency about the process.
RECOMMENDATION:	Label each step and make each step clickable.

Related heuristic: **Visibility of System Status** **Match Between System/Real World**

RELATED USER FEEDBACK

Progress bar lacks short explanations/short labels for each step. It needs more transparency.

Breadcrumbs or page titles needed.
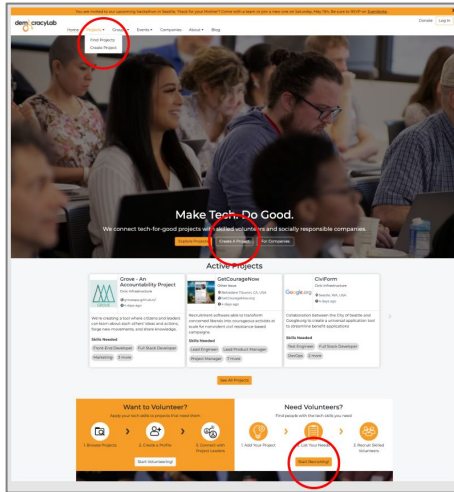Progress bar should be also a navigation.

Progress bar steps could be clickable to let the user move between steps.

LT **MT** *Both user personas commented on this issue.*

UXD *DLab UX Designers commented on this issue.*

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Medium Priority: Create Account/Log In for New Users

ISSUE: Users who did not have an account and began the Create Project process were sent to Create Account (or log in), but then sent to the home page[1] - instead of back to the Create Project flow.

RECOMMENDATION: Bring users back to Create Project flow after creating an account or logging in.
Ideally, add language that says why the user is being taken to the login/create account screen.

Related User Feedback

After clicking on 'Create Project', she was sent to a Create Account/Log In page, but was then sent back to the home page - not to Create Project. She would have liked to have been sent back to the Create Project page after creating an account.

...clicks 'Create Project'. Is taken to Create Account page and then back to home page instead of Create Project flow.

Clicks on Create a Project CTA and is sent to Log In page. Would like an intro with explanation, e.g., 'Before you can Create a Project...'

(LT) (MT) *Both user personas commented on this issue.*

(UXD) *DLab UX Designers commented on this issue.*

Related heuristic: Match Between System/Real World   "Don't make me think."

[1] Most users created an account via Google or Github and did not need to validate their email - so they stayed on the site.

Medium Priority: Start (Project Image)

ISSUE: Usage of image is not clear. Imbalance between visual impact and priority. Issue with viewing image after upload and cropping.

RECOMMENDATION: Lessen prominence of image placeholder, guide users on what to upload, e.g., logo, fix editing functionality.
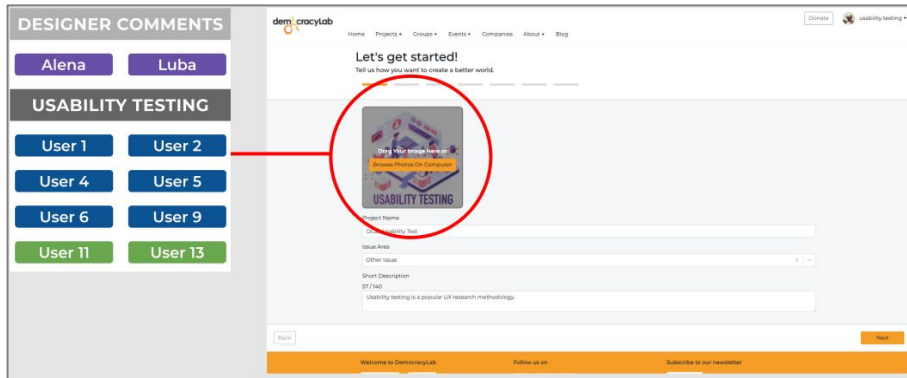
Related heuristic: Aesthetic & Minimalist Design

RELATED USER FEEDBACK

Usage of the project image is not clear. Is it for logo or background image, profile picture?

Large gray box takes too much attention. Project name may be the first form field.

Uploads logo and sees that he can't properly crop it. It's difficult to see the full image and the function doesn't work. Can't properly crop image.

Added an image but later learns that image didn't upload. Realized he would have liked to upload the project logo - asked for instructions that suggest adding a logo.

He isn't sure if it's asking for his image or a project image.

LT MT *Both user personas commented on this issue.*

UXD *DLab UX Designers commented on this issue.*

Medium[1] Priority: About, pt 1 (Technology Used)

ISSUE: Long list of terms. Many not familiar with all terms, not clear if can choose multiple, what if undecided at this point?
Not sure if this is for all parts of the projects or just specific parts. *Also not sure if this is required or optional.*

RECOMMENDATION: Needs instructions so users aren't overwhelmed by choices. Add note that multiple tools can be selected (albeit one at a time.)
Might benefit from an accordion style dropdown, so user will only see options within each category if they click a +.

Technology Used

Select...

Database: MariaDB

Database: Memcached

Database: MongoDB

Database: MySQL

Database: Neo4j

Database: Oracle

Related heuristic: Help & Documentation

Related User Feedback

She is not familiar with names in the technology used form field. She is also confused with the drop down. Are multiple selections possible?

She is not sure if she can select more that one option in the technology used form field. Because most dropdown lists allow you choose only one option.

She says that she has not yet decided to use which tools to build her app/project.

Wasn't yet sure which tech would be used. Is it for the app, site, or whole project? It could be many of these. Not sure what it's asking for.

She liked that she could choose more than one tech tool, but didn't realize it until after she made her first choice.

LT *Less technical users commented on this issue.*

UXD *DLab UX Designers commented on this issue.*

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[1] Medium priority for less technical users.
More technical users did not have as many issues with this field. (One complimented the options offered.)

Medium Priority: Review (Edit)

ISSUE: If user wants to make changes at this point, they cannot easily make edits. (Some users didn't notice the 'Back' button.)

RECOMMENDATION: Consider adding edit buttons for each section to let users easily make modifications.
(A clickable progress bar can help users here and throughout the process.)
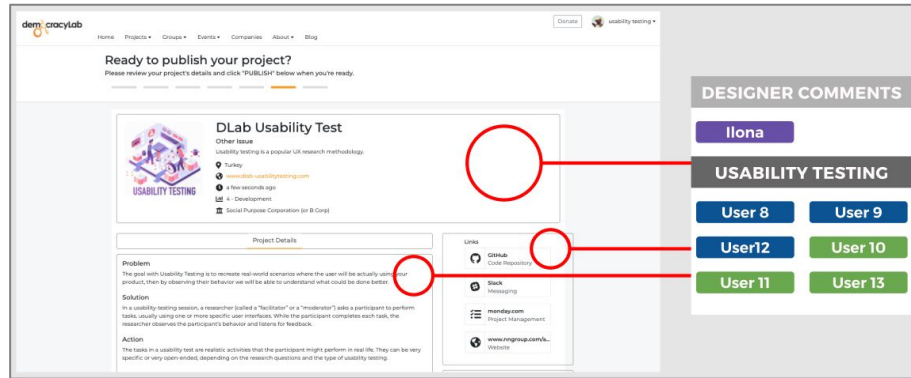
Related heuristic: | Flexibility & Efficiency of Use | Match Between System/Real World |

RELATED USER FEEDBACK

Looked for an edit button.

She didn't see edit buttons on the REVIEW page. She tried to click 'Project Details' since it looked like a link, but it didn't do anything.

Asked how to edit.

He did not notice the back button until I told him where it was.

LT **MT** *Both user personas commented on this issue.*

UXD *DLab UX Designers commented on this issue.*

Low Priority

LT **MT**

About, pt. 1
Org Type

Issue:
- Many were not familiar with org types.
- Testers from other countries noted that options are only US-based.

Recommendations:
- Add guidance, along with tooltips.
- If non-US user add message that options are for US orgs.
- Consider adding "or country equivalent" to each listing,

LT

About, pt. 2 >
Actions

Issue:
- Confusion over which actions to share.
- Some were not ready to answer.

Recommendations:
- Explain that actions are for project (not owner).
- Consider offering examples/default text.
- Consider reminder that this can be filled out later.

LT

Roles >
Multiple/Other

Issue:
- Not all knew they could add multiple roles.
- No "other" option.

Recommendations:
- Consider success message: "You have added a volunteer role. Would you like to add another?"
- Offer "other" option.

MT

Roles >
Description

Issue:
- Some users asked for sample templates / default text for each position.

Recommendations:
- Consider supplying basic templates or samples for users to either copy+paste or edit.

LT

Review
Save for Later

Issue:
- Not all are ready to submit project.
- Missing 'Save for later' option.

Recommendations:
- Add 'Save for Later' button.

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User Journey: Less Technical Users

Home	Start	About 1	About 2	Project Resources	Roles Needed	Review	My Projects

Less Technical

10

12%

39%

9.9%

42%

6.6%

38%

15%

35%

$$\text{ISSUE FREQUENCY} = \frac{\text{number of issues}}{\text{total participants}} \times 100$$

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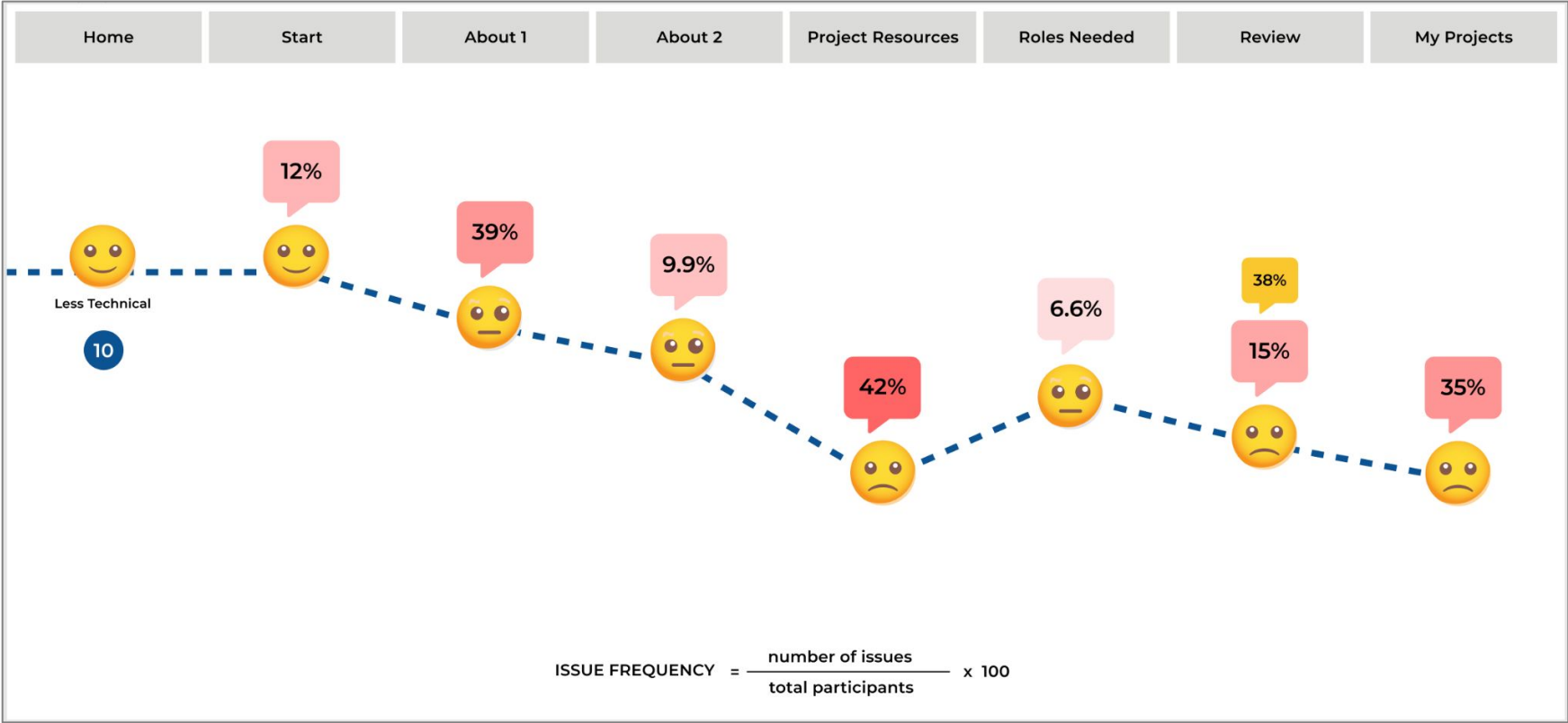
User Journey: More Technical Users

Home	Start	About 1	About 2	Project Resources	Roles Needed	Review	My Projects

Technical

3

13% 26% 13% 21% 44% 83%

$$\text{ISSUE FREQUENCY} = \frac{\text{number of issues}}{\text{total participants}} \times 100$$

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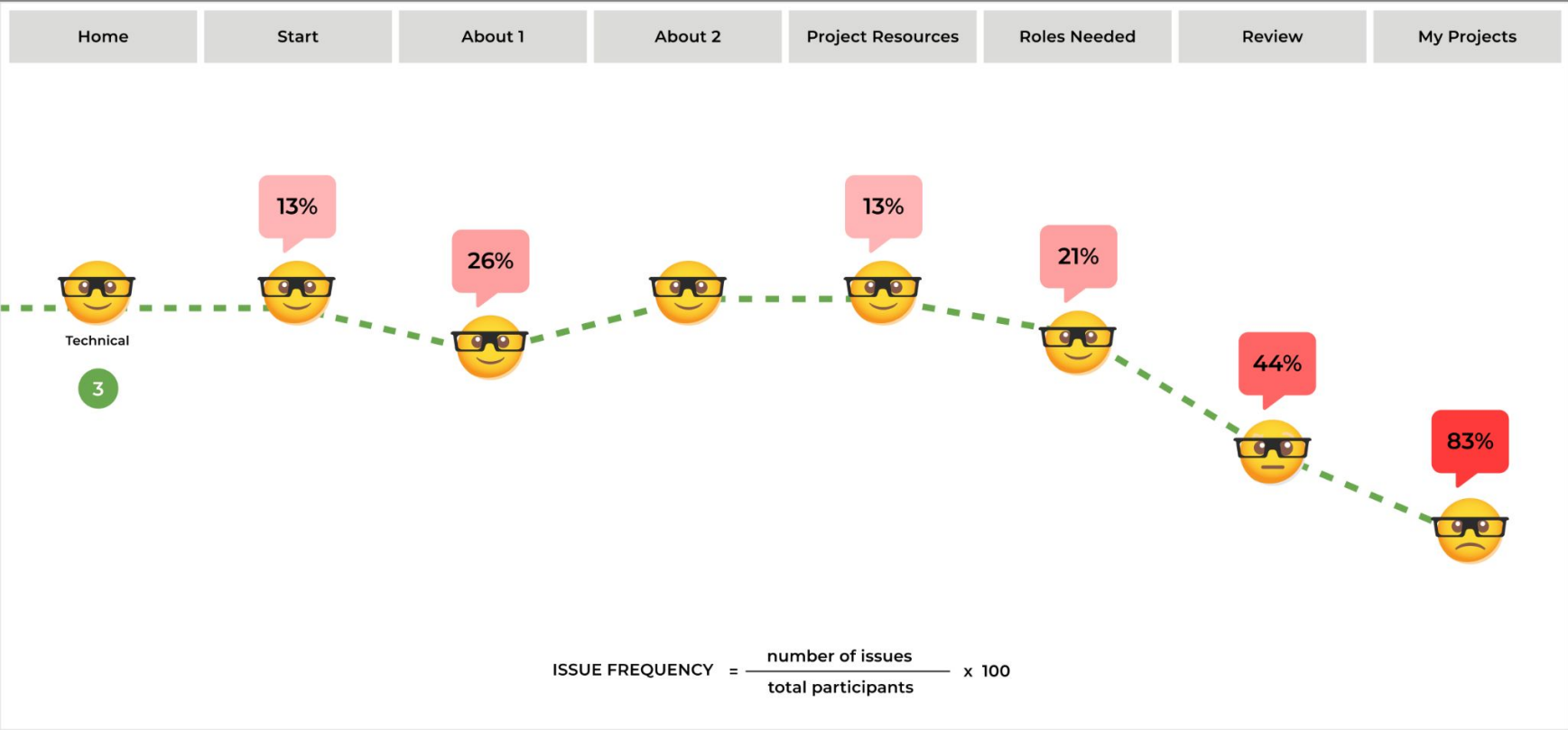
Additional Commentary: From Less Technical Users

Less Technical Users LT

General feedback for the process:

The task wasn't that hard, but struggled to find what she needed at first.

Thought it would require less info/detail. Wasn't prepared for it. Instructions at start would have been helpful.

Thought it was "super easy", smooth, liked dropdowns, lack of clutter. Aligned with her thought process, followed her mind map.

Overall the process covers all the needed information.

She says that overall it looks nice. Looks friendly and easy to use.

Overall it is very straightforward and descriptive.

She thinks that it looks neat/nice overall.

Elements they liked:

Liked the layout [of the Review] page, thought it was clear and legible.

General feedback for Democracy Lab:

"I really liked the concept and purpose of [the site]. It felt fluid to use."

Likes the idea, [sponsor] support, and partners (feels authenticated).

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Additional Commentary: From More Technical Users

More Technical Users MT

General feedback for the process:

Too many extra clicks, placeholder text could've been more descriptive. "I had to put in a lot of effort."

Image issues, lack of contextual information. # given from POV of average user.

One tester recommended looking into code that can pull most of the requested info from Github (if many project creators use it).

One tester suggested offering a paid version where a project creator can get guidance from a mentor.

One user would like to know how long the project and volunteer roles would be open for.

2 of 3 wanted more info on the company/platform before starting the 'Create Project' process.

- One wanted more info on the company and process (an explainer video, images, anything for "How it Works", etc. It's too much for him as a starting page. Is it free? Is it easy? He also wanted some reassurance that the site/company was active, suggesting a counter with how many volunteers/projects were currently active.
- Another tester wanted to see some other projects.

Elements they liked:

Looking at the project on the 'Review' step, one tester's reaction was, "Ooh, it looks good." He said he liked the layout.

One tester liked how the technology options were categorized (by CRM, database, etc.) and that it's auto-complete. Thought it was very well done.

General feedback for Democracy Lab:

"I really liked the concept and purpose of [the site]. It felt fluid to use."

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Appendix

Appendix: File Links

Figma Files

User Comments by Persona and Step
https://www.figma.com/file/n7k8gPEzlFPFDp0DGYC61i/createProjectUsabilityUserComplaints-Sorted-by-Issue?node-id=0%3A1

Issues
https://www.figma.com/file/CQue3ItgHoFzhoRRgTW2f2/usabilityData?node-id=0%3A1

User Journey by Persona
https://www.figma.com/file/sRaUEEjKVenNt6IaKykj6A/usabilityDataUserJourney?node-id=0%3A1

Google Sheet

https://docs.google.com/spreadsheets/d/1sjBH-pzCm9j0nrCWwQe7ZVMFZg0wAqwu6n2TSiEyWZM/edit?usp=sharing

Appendix: Heuristics

Issues fall under the following heuristic[1] categories:

Jakob Nielsen's
10 Usability Heuristics for User Interface Design

Visibility of system status
The system should always keep users informed about what is going on, through appropriate feedback within reasonable time.

Match between system and the real world
The system should speak the users' language, with words, phrases and concepts familiar to the user, rather than system-oriented terms. Follow real-world conventions, making information appear in a natural and logical order.

User control and freedom
Users often choose system functions by mistake and will need a clearly marked "emergency exit" to leave the unwanted state without having to go through an extended dialogue. Support undo and redo.

Consistency and standards
Users should not have to wonder whether different words, situations, or actions mean the same thing.

Error prevention
Even better than good error messages is a careful design which prevents a problem from occurring in the first place. Either eliminate error-prone conditions or check for them and present users with a confirmation option before they commit to the action.

Recognition rather than recall
Minimize the user's memory load by making objects, actions, and options visible. The user should not have to remember information from one part of the dialogue to another. Instructions for use of the system should be visible or easily retrievable whenever appropriate.

Flexibility and efficiency of use
Accelerators — unseen by the novice user — may often speed up the interaction for the expert user such that the system can cater to both inexperienced and experienced users. Allow users to tailor frequent actions.

Aesthetic and minimalist design
Dialogues should not contain information which is irrelevant or rarely needed. Every extra unit of information in a dialogue competes with the relevant units of information and diminishes their relative visibility.

Help users recognize, diagnose, and recover from errors
Error messages should be expressed in plain language (no codes), precisely indicate the problem, and constructively suggest a solution.

Help and documentation
Even though it is better if the system can be used without documentation, it may be necessary to provide help and documentation. Any such information should be easy to search, focused on the user's task, list concrete steps to be carried out, and not be too large.

***Plus…* Steve Krug's** "Don't make me think."
Follows the basic belief that users should be able to accomplish their intended tasks as easily and directly as possible.

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Appendix: Heap.io Data

3-Step Funnel: Page View - Home Page → Page View - My Projects

0.12%
of users complete funnel

1) Page View - Home Page
highest drop-off happened after this step

| | | 0 | 500 | 1.0k | 1.5k | 2.0k |

1 Page View - Home Page   1,663 users

↓ **97.84%** drop-off

2 Page View - Create Project   36 users

↓ **94.44%** drop-off

3 Page View - My Projects   2 users

⊘ **0.12%** total conversion rate

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