Cognitive Walkthrough

Client-provided scenarios

Case 1: Create and post a new job

In this use case a recruiter wants to create a new job in ApplicantStack and post it to their website and third-party job boards in order to collect applications from candidates.

Case 2: Review the candidates that have applied for a job

In this use case the recruiter or hiring manager needs to review the candidates that applied to a job to determine who to move to the next step of their hiring process (e.g. phone screen, interview, etc). The following are typical steps and actions in this use case.

Case 3: Email a candidate

In this use case a user (recruiter or manager) wants to email a candidate in their database through ApplicantStack. The following are details and typical actions.

Cognitive Walkthrough

Case 1: Create and post a new job

I was able to accomplish the job posting process with minimal use of help and without missing any critical tasks. It did however take a very long time and there were confusing and frustrating moments along the way. With a few UI tweaks and some revised micro-copy, this process could be made smoother.

I scan the top navigation the boxes and the sidebar and nothing jumps out as an obvious place to go. I would assume this is one of the first things a new user would want, so they should not have to hunt for it.

You should use the QuickStart area to elevate some more specific help. General help is great, but what would be really 'quick' is to focus on more task-level help for critical tasks like posting a job.

In the Pipeline Summary area, you could include calls-to-action for tasks like 'post a job' at the top or bottom of the table (if the table ever gets very long, it may be best to include above). I would also include quick links to your most asked help questions / most common critical tasks in the section below search on this page https://help.applicantstack.com/hc/en-us

You even have a sidebar on the right devoted to tasks. Post a job should be there. If someone is a first-time user, you could have the ‘post a job’ menu item enhanced visually by color or attention-grabbing iconography.

The most visually loud item on the page is the call to upgrade. Not really what I need to be paying attention to as a first-time user who is not yet sold on your product. This kind of messaging is one that should pop up after the first 3 days as an attractive banner / modal that has 3 benefits of upgrade bulleted and a big pretty upgrade button (and smaller learn more link in case they need to talk to someone first).

What is being done in terms of a funnel for first-time / trial users? What is the current conversion look like along this funnel? For example, if a user logs in once and doesn’t log in for a week, are we contacting them to see if they need help or want to give feedback? Do we just let the user go on their own or is there more of an account manager led experience where first-time users get more hand-holding?

I feel compelled to use the top navigation before the sidebar. Sidebars generally appear on the left in desktop because users view pages in a ‘F’ pattern. Consider moving the sidebar to the left-hand side.

Any of these suggestions can be tested before they become part of a release. VWO is a robust tool that allows you to manipulate existing pages in-browser and test those changes to a portion of your users. If the test results in an improvement, then it can be rolled into the next release.

I click on Jobs in the top navigation and there are no way I can see to post a job. A big juicy ‘post a job’ call-to-action with button would be appreciated under the table on this page (above if the table gets long). I don’t know if the table paginates at a certain number of entries, but it should be paginating at 10-25 items.

I went back to home because it seemed like the sidebar is different.

The sidebar is different! I wasn’t expecting that. I was thinking it was secondary navigation, but not that it was page-specific navigation. That did not register for me. There are also a ton of choices. Users start to lose focus when a list of links contains any more than 5 or so links and this page has 12. Consider moving links out of this sidebar and giving them context in the page where possible. For example, there is a delete option in the sidebar. This is actually kind of scary. What I am deleting if I click it? If something unexpected happens, will I be able to recover? Yikes.

Icons are getting repeated for different tasks. ‘Set user access’ and ‘Edit launch status’, and ‘Edit’ in the table all have the same icons. Do all of these go to the same edit screen?

Look! There’s a create job button at the top there. Sweet.

A modal pop-up is asking whether I want to create from a blank form or generic template. I don’t know the difference. They sound like the same thing. It would be great to have some assistive text or preview ability to know which is right for me.

They appear to be the same. If I have no custom templates, I should not be given the option to select a template, but I might want the opportunity to create a template.

Filling out the form is a breeze. There is a lot of help text that may be unnecessary in some cases. ‘Location’ and ‘Enter the Location of the job’ could be ‘Job Location’ with a tool tip that give further explanation if the user wants it. Another option to handle this would be to hide the assistive text until the user clicks on the input.

The ability to add merge codes into the description is really cool. This area could be presented as an accordion or tree UI to help with scannability.

Salary range should be a picklist for lowest number in the range and highest number in the range. Otherwise you’re introducing variation into the submitted information. Sometimes user might put a single number. They might say 44k to 56k or $75,000 - $80,000. This may not be a huge issue, but it can lead to mistakes / user error and would make the data more difficult to parse if ever needed.

I’m curious about the UI change when there are multiple hiring managers or job owners. (test later)

Job Workflow and Application Workflow don’t have any other choices, so that should be handled like the template mentioned above. If there are no other options than default, the option should be given to create a workflow or preview the default workflow. Messaging that links the user to the default workflow documentation would be appropriate here.

I’m curious about the choice to have ‘save’, a primary CTA, to be teal. It might be better to have it be a more attention-getting color in the brand palette.

After saving the job, I’m confused as to what ‘set stage’ is. Cancel doesn’t seem like a stage. Status might be more appropriate. Also, I’m not sure what would be cancelled since this is a draft and nothing has been activated. The user should be able to select the ‘stage/status’ from where it is listed under the title. With a link elsewhere to view status history (historical data about past statuses). Also, this seems like developer jargon creeping into the UI. This would be better served by more clearly labelling the page with a title that includes the word DRAFT. Then there should be buttons allowing the user to complete relevant tasks such as ‘open job’ / ‘post job’ and ‘save draft’ or ‘delete posting’, ‘edit posting’. If there is a workflow that I have entered, it would also be helpful to see a visual progression at the top of the screen letting me know what stage of the process I am currently in. It would let me know if I am on step 2 of 4 (or 2 of 10!), and let me navigate backwards to previous steps as well. Giving users this information lets them better gauge whether they can finish their task in the time they have set aside for it and lets them know what to expect as they move towards task completion.

Listing section only contains the job description. I don’t think of just the description as the listing, I think of the whole thing I just filled out as the listing. This is unclear. Is the description going to be the only thing that shows up in the listing? If so, I need to work a lot more on the description.

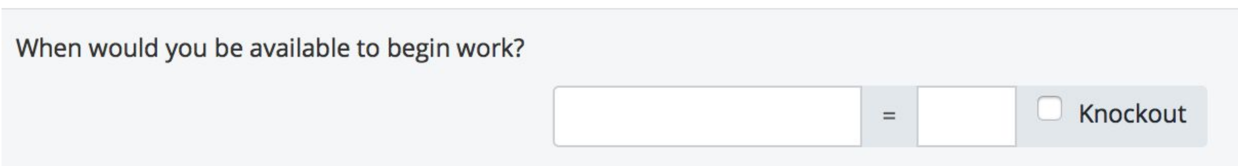
I click preview. OK, this looks nice! I do need to work on the description more though. I go back to ‘edit listing’ and work on the description more.

I click on Questions and add a questionnaire from the library. Confused by the options to Share or Copy. More explicit and user-friendly language would be Copy this Questionnaire' (which would be share) and 'Edit this Questionnaire' (which would be copy). Also, I selected 'Share' but was still given the option to edit. I would say that this option could be done away with and the user should always be given the option to edit. If they don't want to edit, they can just ignore it. Is there some reason why the user needs to make this choice? What if they select as-is (share) and want to edit (copy) later? Is this actually a way to add it to a library or not? I am still confused on this one.

Some pages have a 'video help' message in blue near the top. This is helpful, but could use a different visual styling. It is very low contrast.

I preview the listing with the questionnaire added. Looks good, but the listing is very long now. I wish I could have the questions appear on a 2nd page.

The scoring section, for the most part, made sense and worked as expected. I do not understand what this set of inputs is asking for. What goes after the equal sign? The only help available is video and I may not have time to watch a whole video to learn the answer to one question. I click on it anyway and see it's only 2:30 min long. I skip through it and that type of field isn't covered. I skip it.



I successfully created a rule and click 'run rules' to see what it does. It does nothing. This should be hidden or grayed out until it is usable OR an appropriate error message / alert should inform me that I need to do X before I can run rules.

I move to launch which lets me know the job needs to be open for me to launch. Seems redundant, but OK. I open it and set myself to receive a notification - which I got in seconds (nice!).

The launch page has refreshed on its own and now I can see all the options of where to post the job. This is well-laid out and easy to understand. The logos for each platform help me recognize what I have to choose from. I want to post to everything but Juju though… it would be nice to be able to be able to hit a button to 'post to all' or be given an option to select all (deselecting Juju manually).

I select 'job board' and go to a screen where I can select all (nice! just wish I'd seen this on the previous screen). I deselect Juju and hit next.

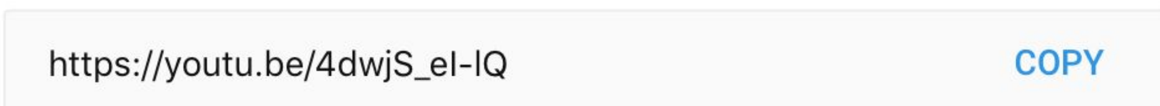
** Please be aware that we will post this job on your behalf but we can't guarantee organic placement on sites like Indeed. Typically these sites only include jobs from Direct Employers in their organic feed. All new clients are subject to a review period which could delay your initial posting.*

Message is helpful, but I wish I knew how long ‘a review period’ might last. Will I get a notification when the review period is over? This job needs to be posted, like, yesterday!

I noticed posting to social is also available and those work as expected. The social channels I want to post to are included.

The manual posting area looks good, but the email is confusing. It took me a second to figure out that these are email addresses. I think the labels should be clear in saying these are email addresses (not emails) and that they might need to be separated from the links above. The assistive text is very verbose here and hard to follow. Needs revision for user-friendliness. The link to the launch help at the top of this section should anchor link to the part of the help page that talks about the manual posting area. It is very far down the page and small (hard to find and easy to scroll over).

I command+C to copy the apply email address, scroll back up to the Job Boards and hit ‘edit posting’, but it takes me to an ‘edit launch’ page instead. Frustrating. I guess I have to find some other way back to add the email. I go to listing and command+V to paste and it pastes some old line of text instead. I try again and it does the same thing. I go back to Launch and use the right click menu to copy and this time it works. There should be a more obvious way to copy (see youtube’s share links that has a copy button that lets you know the link has been copied)



Once I update the listing I check my job board and the email is there. Great! Looks like I’m done.

Case 2: Review the candidates that have applied for a job

I go directly to the candidates page using the navigation and see a big detailed list. I want to narrow the list down, so I take a look at ‘candidate filters’. I’m not sure what to click on, so I click on My Active Jobs and the filters reveal themselves. I see what’s going on here. I filter for the ‘Accounting Manager (sample) and the list filters automatically. The ‘active filter’ tags also update.

I want to review a new candidates to see if there are any that would be a good candidate for interview. I can clearly see the KO candidates, which is helpful. I see I can also filter out the KO candidates too, which is nice to get all that unnecessary stuff off the screen. It’s also a lot more clean and calm without all that red. I want to see the candidates with the highest score, so I click the ‘score’ header in the table and it sorts.

There is a ‘Top Prospect’ (Michael Turner) that has no score, so when I sort by highest to lowest score, they appear at the bottom of the table. This makes me wonder how they can be a top candidate if they don’t have a score. I would have missed him if I didn’t scroll down. I click on his name to view more information. It’s a little hard to read. I want to check out some of the other top candidates before I reach out. I still don’t understand why he doesn’t have a score.

I hit the back button to go back to the list. I click on a ‘Top Prospect’ with the highest score (David J. Jones). It seems like there are Accounting Manager questions that the first candidate didn’t answer which is what the score comes from. I click on Resume and it downloads. He looks all right. I click ‘return to list’ that I just noticed, and pick a Potential. I move through the tabs, and when I get to the workflow tab, I see it doesn’t give the option to change the workflow, just shows me the history.

Case 3: Email a candidate

I go back to the list and select another Top Prospect. He looks great and I want to reach out to him, but I don’t see any way to do that. I go through the tabs a few times and scroll around. I look at the ‘set stage’ UI element to see if that has some kind of ‘make contact’ stage.

I finally remember that right sidebar is there. I haven’t had to interact with it at all yet, so I keep forgetting it’s there. Sigh. There are so many links there. Hopefully one sounds like what I need. ‘Create a candidate’ (no, that also seems an odd thing to want to do while I’m viewing a candidate’)... ‘Upload a resume’ (nope)...’Upload emails (ones between me and the candidate?), Add to job (add what to job?), Search (for what?)... Five links in and I’m not seeing anything that I need yet. Run Report (not what I want to do right now)... ‘Email Candidate’ (yes! I found a way to contact them through the system!)

The email creation page is simple to move through and I can easily edit the message itself and even include more questions based off one of the system templates. I don’t currently have a signature, so I click the My Account link and add one and hit save. Ok, now how do I get back to my email? I don’t see any way to do it easily on-screen, so I hit the back button. I hit it a few times and my message is gone. I go back up to the selector for template and deselect, then reselect the template I want and re-write my message. I wish I had saved! I hit ‘send’ and get a success message. I am promptly redirected to the homepage, but wasn’t really done with looking at candidates! I have to navigate back to the page I want and reapply my filters. This will get tedious if I have to go back to ‘home’ every time I send an email.