UX Solutions

ApplicantStack's UX audit was performed in the context of 3 key use cases:

1. Create and post a new job
2. Review candidates that have applied for a job
3. Email a candidate

The following solutions are prioritized based on how much of an impact they would have on user success. Both **quick wins** and **long-term solutions** are offered where applicable.

Priority 1 Solutions

Priority 1 recommendations are critical to user success and should be given highest priority.

Start gathering data on key user metrics.

You can't start this doing this too early and if you start collecting data by the end of 2018, you'll have a clean start for a 2019 that is filled with user-centric, data-driven insights.

These metrics should be gathered through a variety of sources including quantitative data analytics (Google Analytics is a great place to start) and qualitative data sources like surveys, help desk conversations, in-app feedback, and user testing. (HotJar, Qualtrics, Pendo, and UserTesting.com are all great options).

There are lots of different ways to measure success with data. KPIs (key performance indicators) are used to determine whether business objectives are being met.

You can use **PULSE** metrics for tracking the success of technical performance of a product.

- **Pageviews**: Number of pages viewed by a single user.
- **Uptime**: Percentage of time the application is accessible.
- **Latency**: The time it takes data to travel from one location to another.
- **7-day active users**: Amount of unique app users over the last seven days.
- **Earnings**: How much revenue is generated by the product.

HEART metrics can give insight into how users feel, think, use, and talk about your product.

- **Happiness:** The amount of satisfaction or delight that a user feels in relation to your product. Net promoter score (NPS) is a popular way to track this metric.

- **Engagement:** The degree to which a user interacts with the product. Examples include: visits per week, actions per visit, etc. Custom event tracking can be set up to track specific touchpoints (e.g. created a job, sent an email).
- **Adoption:** The number of new users (or uses of a feature) within a set amount of time.
- **Retention:** How many users continue to use the product over a certain time period.
- **Task Success:** How well a task is completed, how quickly, and the amount of errors committed on average when completing the task. This metric is best tracked during user testing so the nuances of usage can be observed.

Elevate critical tasks on the homepage.

The layout of the page could be improved to clarify (1) what paths are available to the user (2) what's happening with each of their jobs.

- Highly visible, clear calls to action (e.g. post a job, send an email, create a task).
- Snapshots of information related to each call to action should be available to give the user an at-a-glance overview and help them decide which action to take.
- Help sprinkled around in-context instead of always at top left, occupying prime real estate.

Quick win: Work critical CTA buttons into home page

This section could be nice for first-time users, but for others, not so much. Pairing a CTA to post a job with a smaller link to 'learn how to post a job' would retain the helpfulness, but add a way for the user to act.

The 'Getting Started' link that appears in the top spot of the sidebar seems like a really helpful thing and would be right at home in the Quick Start section.

The most visible CTA on the homepage is the bolded 'Upgrade to a Full Account' link. It's fine to get the user to upgrade, but there is no value proposition here. Tell them why they should upgrade in a modal that appears at critical intervals (after first session, ½ way through trail, 3 day countdown before trial end).

Long-term solution: Homepage Redesign

Of course, we can make our best guesses as to what actions should be elevated on the homepage, but user research should be done to identify the top 3-5 actions as user wants to take as soon as they login. Those 3-5 things should be given prominent placement in a homepage redesign. You may find there are different types of users who want to see different things, which opens the door to personalization based on user type. You may find the opposite and will be able to confidently streamline your experience.

Before launching the new homepage, test it with both new and old users to make the new design hasn't missed the mark. When it launches, consider an in-app walkthrough to let users know what has changed and how to move around.

Clarify usage of the task sidebar.

The changes that occur in the sidebar from page to page are not intuitive. Users show know exactly what those links do. Here are some examples that cause confusion:

- On the candidate detail page, there is a link to 'Run report', but I can't imagine what kind of report would be run from this page.
- On a few pages, there is a sidebar link to Search, but it is not clear what you are searching for. Upon investigation, the search apparently depends what page you are on.

Quick Win: Clearly label sidebar menus and links

A clear label on the sidebar menu that should describe what it is for. A consistent schema like 'Job Taskbar'/'Candidate Taskbar', or 'Manage Jobs'/'Manage Candidates', would be helpful. Links themselves should be clearly labelled as well. 'Search' is unclear

Long-term solution: Redesign sidebar / top right navigation

These sidebar menu choices should be reviewed on a page-by-page basis to determine which links need to be always visible, which could be placed in-context, and which could move to the username drop-down? For example, 'Manage Billing' and 'Update Settings' could be folded up into the username dropdown.

User research could be done to inform the design (which links are clicked on most vs. least, etc.). But, as with any major design changes, testing should definitely be done prior to launch to ensure the design is truly an improvement.

Avoid form fatigue, confusion, and abandonment.

Quick Win: Ask for user confirmation when leaving a workflow.

If a user attempts to navigate away from a process, they need to be notified that they are leaving the process and should be prompted to save. Currently, they are not prompted to save so when they navigate away, they lose all their work and have a difficult time returning to the workflow.

This includes scenarios where the user is filling out a form and encounters a prompt to update information or if they try to use the browser's back and forward buttons.

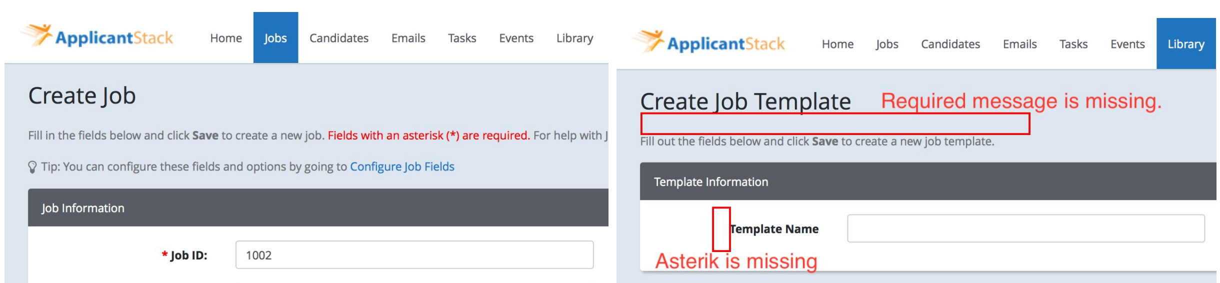
In the scenario that a user is asked to update information while filling out a form, they should be able update information without having to leave the page. At the very least, they should be redirected back to the form after information is successfully updated.

There might be other scenarios in the app where this kind of confirmation / prompt to save applies. All workflows that require the user to save should always prompt the user to save before exiting the page.

Bonus Quick Win: Require only critical information before saving a form.

All forms on the site should be audited to ensure only critical information is required before saving. For example, physical address is required when creating a candidate. The user may not have that information yet, but still want to add the candidate into the system. The user should be able to save the candidate with a name and email, and add more information later.

Required information should also be clearly labelled. Currently on the 'Create Job Template' form, there is no indication that 'Template Name' or 'Job Description' are required fields, but if the user tries to submit the form and leaves those fields blank, it will throw an error.



All forms should be reviewed to (1) determine what is truly required before saving and (2) ensure all required information is clearly labelled.

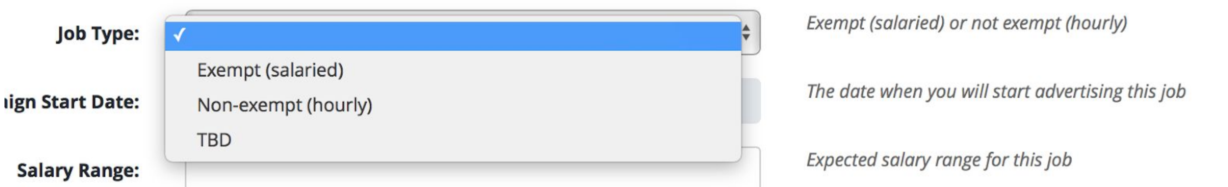
Long-term solution: Revise form design.

The following solutions need to be addressed in a redesign of forms:

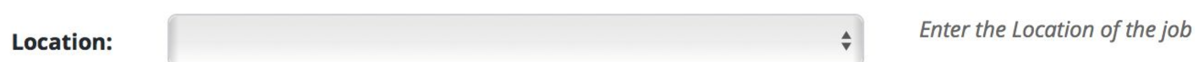
- Break longer forms into multi-step forms, complete with progress indicators. It gives users peace of mind to know the form has 5 steps and they are on step 2.
- Format input for things like phone number or address. A phone number input that already has (___)___-____ in the field clears up any ambiguity for the user.

- Form errors should appear next to the field where the error occurred. This lets the user more easily find and correct the error.
- Validation should take place in-form as the user moves through it. For example, if the user types 'jim@company' in the email field and then moves off to the next input, the form should return a error message that tells the user that the email format is incorrect.
- Help microcopy needs to only appear when it assists the user. By giving the user so much help text to look over, you run the risk of information overload and mental exhaustion on one extreme and the user choosing to ignore on the other extreme.
    - For help microcopy that remains, consider moving that text into tooltips or placeholder text within an input (depending on amount of explanation needed).

EXAMPLE 1: Job Type microcopy just repeats the choices available in the dropdown. The redundant microcopy is not helpful and draws the user's attention away from moving through the form.



EXAMPLE 2: Location microcopy states the obvious - even for new users. The label could be 'Job Location' to ensure no ambiguity.



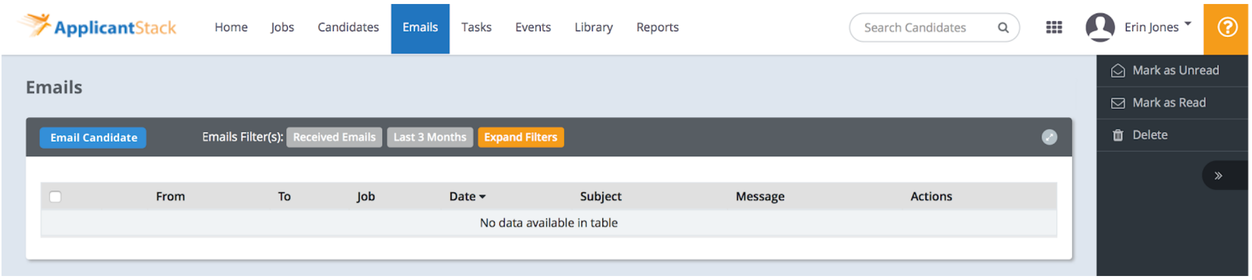
Priority 2 Solutions

Priority 2 recommendations will greatly reduce a user's likelihood to experience stress and confusion during their app session.

Add clear CTAs on sub-pages.

Users expect to be able to take certain actions on sub-pages like 'Email', 'Tasks', Library', etc. When that action doesn't seem to be immediately available, confusion can set in. Even placing the action in a sidebar might not be immediate enough.

- The task tab should have a 'create new task' CTA.
- The email tab lists emails, but there is no way from this page to start a new email thread. 'Email Candidate' should be a prominent CTA button on this page that goes to the Email Candidate page.



Calls to actions should be visually distinct and clearly labelled. On the Job Summary page, where it lists ‘Status: Open’ and 'Candidates: 9', there should be buttons that say ‘view open jobs’ and ‘view candidates'. The ‘Open’ link could even be removed, but not without knowing whether users are using it through analytics.

Each page that a user lands on from the main menu (Jobs, Candidates, Emails, etc.) should receive this treatment.

Tailor UX to user expertise level.

Help is very prominently displayed all over the site, but some expert users may no longer need help.

For novices, help is readily available in video, documentation, assistive text, etc., but there are no real shortcuts or expedited paths for experts. The experience does not seem to change relative to the level of user expertise. For example, the first time user could be prompted for a walkthrough or help, where the user who has had enough sessions will not get the same prompt. There is a way to collapse the right sidebar, but it took me a few sessions to notice it. Should be more clearly labelled.

Redesign search filter UI.

Currently, the user must go back and forth between multiple pages to refine their search. Being able to filter the results directly in-page would save time and and reduce the likelihood of user error. There should also be a way to clear all filters.

It is a best practice for filtering UIs to use checkboxes instead of dropdowns. When all filters are visible it is easier to understand what options are available and what filters are currently applied.

Test designs for the pipeline summary.

The pipeline summary has a grid of linked numbers. My test user only had 3 jobs and still it was a little hard to know which number to click and why. Tables are a great way to present tabular data, but this content might be better served in by a card UI or some other pattern. This section has a potential to be incredibly useful. User research would reveal more about how users interact with it and how often. That research would then inform the designs to be developed, tested, and delivered.

Include other categories in search bar.

The 'search for candidates' input is easy to find. This would be even more powerful if the user could choose what they are searching from this bar through a filter. Choices could be (email, job, library, etc.)

Look into whether users ever need to search through emails (or other types of information). A user might conceivably want to search for an email from a particular candidate straight from the homepage or at least the main email screen.

Give an error when search fails.

I typed 'bill' and 'robert' into the 'search for candidates' input, hit enter, and the page just reloaded. No error or messaging. There should be a notice to the user that there is no 'bill' or 'robert' in the system. A simple alert or message in the auto-suggest area that says 'name not found' would be appropriate.

Priority 3 Solutions

Priority 3 recommendations address issues that stand to greatly reduce the chance of friction or cognitive dissonance within the user experience.

Update mobile UX patterns.

Mobile experience is usable, but could use a redesign of it's navigational elements (sidebar should be revealed on gesture (drawer UI), the logo should be in top left and link to home, etc.) In order to properly prioritize this recommendation, user research should be done to see if users find the current mobile experience satisfactory or not.

Consider offering phone or chat help.

Email is easy, but many users expect to be able to get immediate help by phone or a chat function. Chatbots could even be used to answer commonly asked questions, then prompt the user to email or call if the user needs more assistance.

Begin auto-suggestion sooner.

The search auto-suggests George M. Blake if I start typing his name in, that's great! What would be really nice is if it happened a little sooner. Typing G should bring up all names that start with 'G', then the suggestions should continue to narrow as I continue typing 'Geo..'. It does not handle misspellings well, but this more aggressive auto-suggestion could help with that.

Update typography styles.

Typography should establish a visual hierarchy on the page. Page Headlines should be larger than Section headlines. Section headlines should be bigger than body copy. Currently, the body text is set to 12px and UX guidelines suggest body text should be 14-16px and up. Anything smaller than that should be reserved for fine print.

Link the logo to the homepage.

Users should be able to click the homepage logo to get back to home. This is an easy fix and a UX best practice. https://www.nngroup.com/articles/homepage-links/

Add breadcrumb navigation to all pages.

There are no breadcrumbs, but the site is not terribly deep (in the interactions I have been testing). Active menu items are highlighted.

Adopt a friendlier tone in favor of technical terms.

Demographics indicate that users might prefer a friendlier, more conversational tone for microcopy. 'Set Stage' seems like a developer choice. Does the user think of it as a stage or a status? Maybe even something else. Help notation on forms is useful sometimes, but sometime it gets dense or is not necessary ('Location' label should be 'Job Location' and the help text can go away).

Remove marketing language from help.

The user has already chosen your app. They just need help. This should be done as a periodic internal review of help content to audit for things like: avoidance of jargon, proper tone of voice (no marketing), changes related to updated UI, concise and clear instruction.

Example:
https://help.applicantstack.com/hc/en-us/articles/115000715074-Hiring-Manager-s-Guide-Recruit-