

Lessons on testing: Principles, Tools and Techniques to maximise your impact.

Engaging Networks Community Conference UK, 2022

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WHAT'S AHEAD



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- Visualising Data
- Expert UX Review
- Moderated User Tests
- Unmoderated User Tests
- Visitor recordings
- Heatmaps
- Ranking A/B Tests
- Many small changes vs one big change

What to test.

How do I know what to test?

Review your analytics

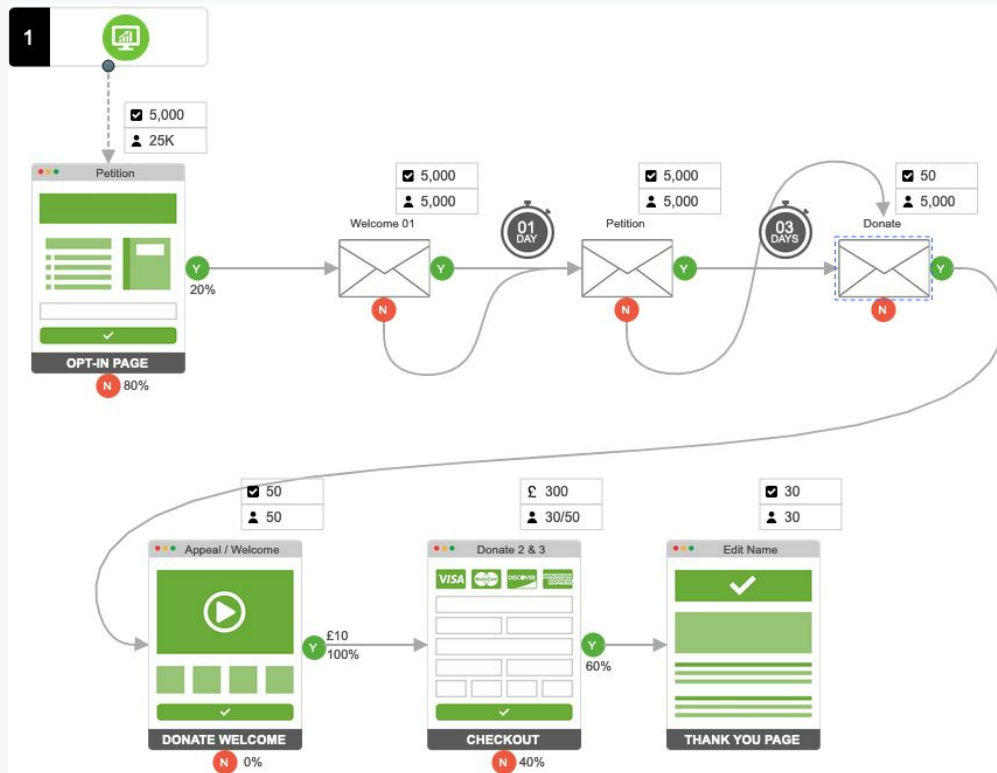
Focus on the part of your funnel that has the most potential.

If you want to improve the number and value of online donations, the tendency is to focus on improving the donation page.

Funnel Visualisation

Visualise and forecast your returns based on real data.

- ✓ Gather data on your funnels.
- ✓ Identify where it is underperforming.
- ✓ Focus on the area that maximises returns.
- ✓ Here, boosting email clicks will have the greatest impact.



Established Guidelines & Principles

There are several frameworks you can use for Heuristic analysis.

- ✓ [Jakob Nielsen's 10 general principles for interaction design.](#)
- ✓ ISO's 7 Dialogue principles
- ✓ Shneiderman's 8 golden rules of dialog design.
- ✓ Gerhardt-Powals 10 cognitive engineering principles
- ✓ Tog's 16 principles of interaction design

Expert UX Review

“The definition of an expert is someone who
knows what not to do”

Charles Wilson

Expert Review

A 150 point checklist based on industry standards and 20 years of experience.

GOALS

Focus on your key performance indicators and what you want to achieve.

01



USER PROFILES

Based on personas of your target audience.

02

USER TASKS

Sets out typical tasks that your users will need to complete.

03

PRIORITISE

Prioritise items in the checklist that may need greater focus based on goals..

04

COGNITIVE WALKTHROUGH

Cognitive walkthrough and document issues that arise based on checklist.

03

REPORT CARD

Detailed list of issues, severity ranking, recommended solution with examples.

06

**Some issues can be resolved
very quickly for immediate
results.**

Expert Review



RNID: Petition Form



Issue observed: The checkbox for optins has a default of **No**. You can't make it mandatory, so people skip it.



Solution: Replace checkbox with styled radio buttons. Make it mandatory so user can't skip it. User has to actively choose yes or no.

Sign the Petition

Sign our petition calling on the government to start the clock on subtitling, signing, and audio description quotas for TV on-demand.

7,343

We've reached 7,343 signatures. Help us get to 7,500!

First name

Last name

Postcode

Email address

Stay in touch

We'd love to keep you up to date with the work we do and about campaigns, related news, health information, appeals, membership, events, products, research and volunteering. Please tick the box below to tell us you're happy to hear from us via email in future. [How we protect your information.](#)

Email

Yes

No

Sign the petition

Expert Review

- ✓ **RNID:** Petition Form
- ✓ **Issue observed:** The checkbox for optins has a default of **No**. You can't make it mandatory, so people skip it.
- ✓ **Solution:** Replace checkbox with styled radio buttons. Make it mandatory so user can't skip it. User has to actively choose yes or no.
- ✓ **Introduce a fear of loss or Incentive of gain** when user selects no.
- ✓ **Optin increase:** From 49% to 70%

Sign the Petition

Sign our petition calling on the government to start the clock on
subtitling, signing, and audio description quotas for TV on-demand.

7,343

We've reached 7,343 signatures. Help us get to 7,500!

First name

Last name

Postcode

Email address

Stay in touch

We'd love to keep you up to date with the work we do and about
campaigns, related news, health information, appeals, membership,
events, products, research and volunteering. Please tick the box below
to tell us you're happy to hear from us via email in future. [How we
protect your information](#).

Email

Yes

No

Are you sure? If you choose "Yes", we can keep
you up to date about ways to get involved, and
how your support is making a difference.

Sign the petition

Eugene Flynn

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**Other issues need further data
to support the review findings.**

User Behaviour Analysis

These tools tell you **WHAT** the problem is.

HEATMAPS

Identify areas of your page getting the most attention in the form of clicks.

1



VIDEO RECORDINGS

Record visitors interaction with your website.

2

FORM ANALYSIS

Tells you what elements of a form are causing problems.

3

UNMODERATED USER TESTING

Give users a specific task to perform. Record and review the results.

4

USER SURVEYS

Capture genuine user feedback through forms on your website.

5

MODERATED USER TESTING

Observe users in action as they navigate and use your website. Gain behaviour insights and real feedback.

6

Unmoderated Tests

Pay users to complete specific tasks and record the results.

Compassion in World Farming



Expert review identified error handling wasn't as intuitive as it could be.



Unmoderated tests revealed users were entering their address detail, then the postcode field was overwriting entered details creating friction.

First Name (required)

Last Name (required)

Address 1 (required)

Address 2 (optional)

City (required)

Postcode (required)

sw197af

63A, Woodside London, SW19 7AF

48A, Woodside London, SW19 7AF

43 Woodside London, SW19 7AF

44 Woodside London, SW19 7AF

45 Woodside London, SW19 7AF

46 Woodside London, SW19 7AF

Compassion in World Farming



Placing cursor in first error field

Adding a red border around error fields


Adding contextual help text in red

Improving the error messaging


Clearer labelling for mandatory fields (required and optional instead of *)




A/B Test revealed a 5.2% increase in conversion rate.

First Name (required) 


First Name is required


Last Name (required) 

Last Name is required


Address 1 (required) 

Address 1 is required



Address 2 (optional) 


City (required) 

City is required

Postcode (required) 

Postcode is required

Country (required)
 United Kingdom 

Email Address (required) 

Email Address is required

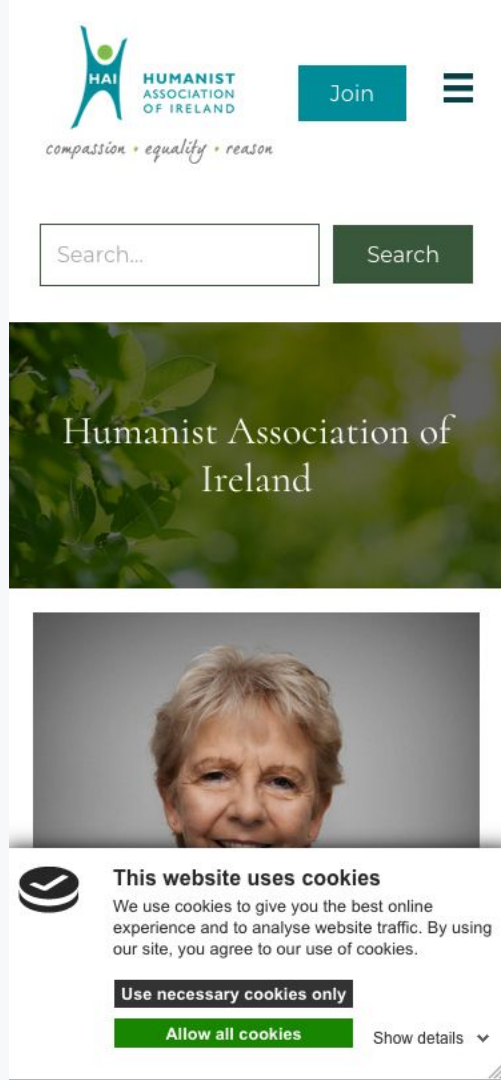
Video Recordings

Install a script on your website that records user interactions.

Be careful you comply with GDPR guidelines.

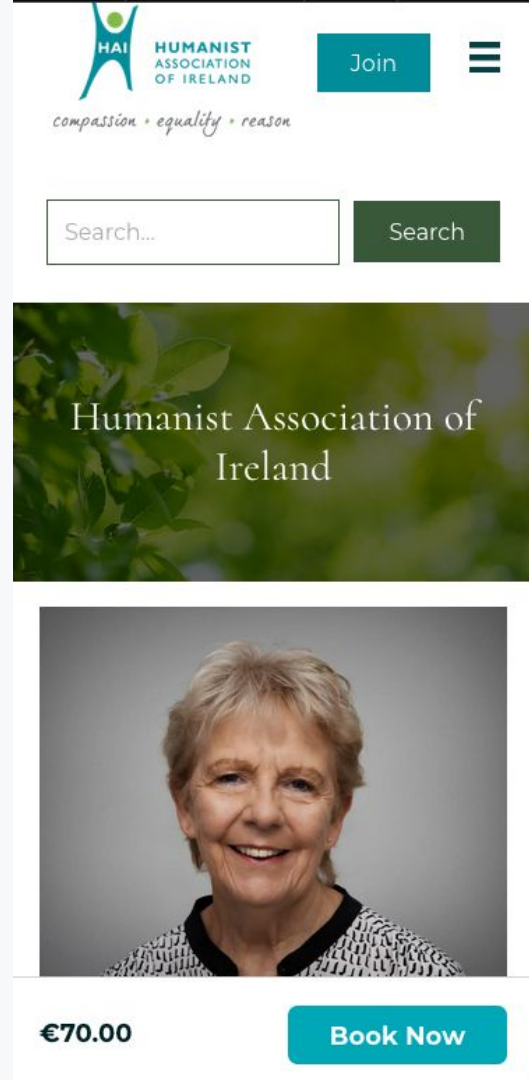
Video Recordings

- ✓ Use your analytics and expert review to identify specific problem areas.
- ✓ Set up recording software on pages where you've identified friction or other issues.
- ✓ [Record users interaction & review the experience.](#) Identify UX issues, how often it occurs and if it creates friction or abandonment.
- ✓ Document issues that arise, prepare a report on the results and recommend solutions.



Video Recordings

- ✓ In this example users couldn't see the booking button in the sticky footer on mobile as it was hidden behind the cookies notice.
- ✓ This issue arose for all users who had not already consented or declined cookies, particularly those who came direct to this web page i.e. those with intent to book.
- ✓ Recommended solution in this case is to display the cookies at the top of screen on mobile for these pages.



Moderated Tests

Recruit testers that are Representative of your target audience.

Give users a specific task to perform.

Record and review the results.

Moderated User Tests



Be Present

With moderated tests you are sitting live with someone while they interact with your website.



Observation

You can observe their interactions, body language, facial expressions and what they say. You can also ask questions.



Identify issues

In this example, our tests revealed people were not sure what to type in the comments field. This created friction and hesitation.

The screenshot shows a web browser window with a form titled "Add your comment". The form is enclosed in a light gray border. At the top of the form is a magenta button labeled "Add your comment". Below this, there are five input fields, each with a label to its left: "First name:", "Last name:", "E-mail address:", "County:", and "Comment:". The "Comment:" field is a larger text area. At the bottom of the form is a green button labeled "Submit comment". Below the form, there is a checkbox labeled "Yes, please display my name on your website" which is checked.

Moderated User Tests



Reduce Friction

Friction describes where a user flow is slowed and in some cases can lead to abandonment.



Add Moderated Comments

We added genuine moderated comments from real users and displayed them beside the form.



Results

Addressing the testers concerns and adding social proof **increased conversion rates by 30% with 64% of people leaving comments.**

Comments were later used in policy submissions and one comment led to additional research.

Add your comment

First name:

Last name:

E-mail address:

County:

Comment:

☒ Yes, please display my name on your website

Submit comment

Do not touch our pensions we are struggling to keep our selves warm this winter already, I am also a full time carer for my wife and myself at 80 years old.

We must defend our old age pension against this bunch of Politician's who will do nothing to adjust their own privileged pensions.

Please do not put older people below the poverty line by cutting our pension.

At the end of the day, if you make cuts it will costs you more in homes, health and you will definitely lose votes.

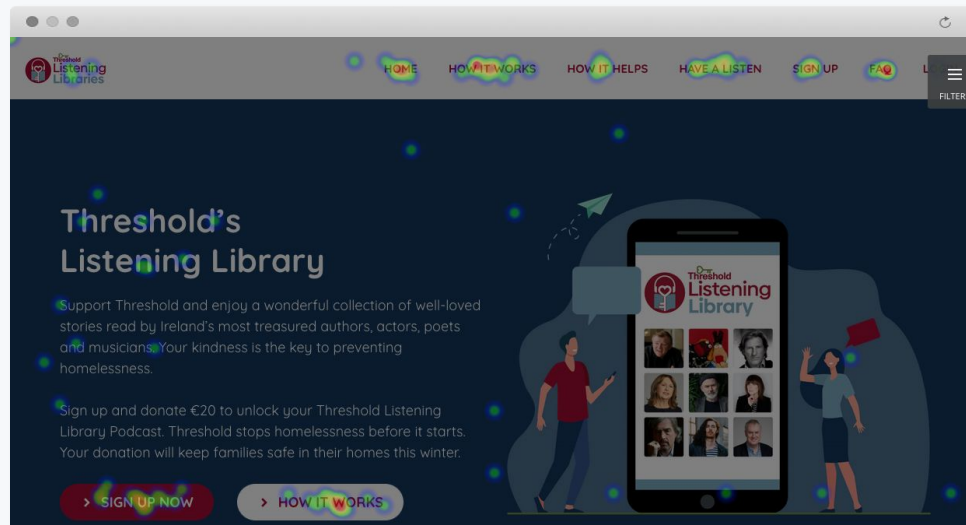
People paid throughout their working lives towards their pension. Any cuts to their

Heatmaps

Identify areas of your page getting the most clicks.

Heatmaps

- ✓ **How it works**
Shows you where people click as an overlay on your web pages.
- ✓ **Limitations**
Has limited value on its own, but when combined with other tests it may corroborate other evidence.
- ✓ **What but not why**
Shows you where people are clicking but you don't learn why they are clicking there.
- ✓ **This example**
Combined with other feedback methods we identified that the concept needed some explaining. Adding “How it works” and “FAQs” led to increased sign up.



Many small changes
vs
One big change

One big change

01

Expert Review

Revealed lots of UX issues and areas to improve.

02

Cost benefit

Many small tests would take a long time and during this time you're losing income.

Donate to Protect Our Ocean Today



Your support is one of the most important investments you can make for the future of our ocean planet.

Thanks to donations like yours Project OCEAN is helping protect the best spots here for the world's most vulnerable shark and ray populations for the first time, protecting our oceans wildlife from the growing and long list of threats.

Help defend the ocean by making a gift today.

PROJECT O

Please Select Your Donation

1000 500 250 100

Donating with Debitcard or Credit Card

I would like to give a

1 MONTH 3 MONTH 6 MONTH 1 YEAR

Contact Information

FIRST NAME * LAST NAME *

ADDRESS 1 *

ADDRESS 2 *

CITY * STATE/PROVINCE * ZIP/POSTAL CODE *

EMAIL ADDRESS * BIRTHDAY EMAIL ADDRESS *

PHONE NUMBER (e.g. +1 123 456 789) *

Your Billing Information

Payment Type *

Cash

Card

Card

Card

Card

Card

Card

Card

Card

Card

Card

Card

Card

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Card

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Card

Card

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Card

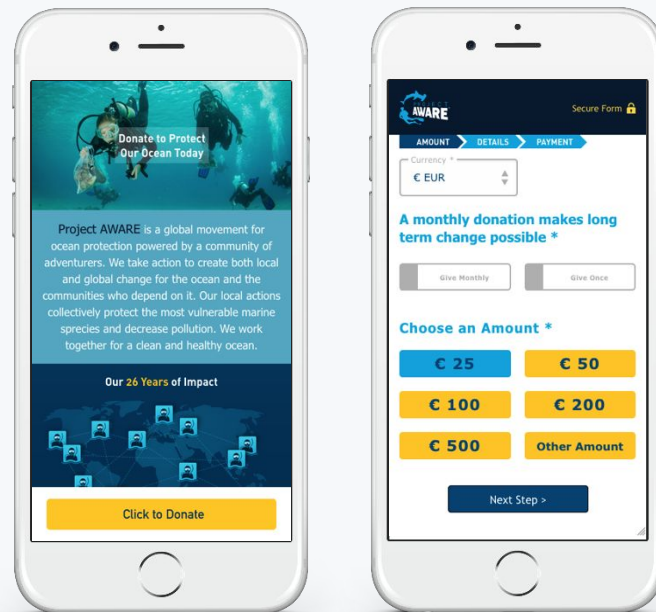
Card

Card

Card

One big change

- 01 Number of cash donations +68%
- 02 Value of cash donations + 68%
- 02 Number of monthly donations + 186%
- 02 Value of monthly donations + 75%



NEED HELP?

I've been helping campaigns and movements grow their impact for 20 years.

- Rapid UX review.
- Detailed expert review and report.
- Coaching & training to assist your CRO team.
- Redesign & Integration of designs in Engaging Networks.

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THANKS FOR LISTENING

Need help getting started, I'm giving away the following to 1 organisation.

- Free 30 minute Rapid UX Review
- 3 months Free Funnel Visualisation Tool
- 3 months Free Research Tools (Heat Maps, Video Recordings, Survey Tools)

Just email me and tell me why testing is important to you right now.

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