

Sample: UX audit of one journey

SAMPLE. This report describes a fictitious energy supplier and a fictitious sign-up journey. Every screen, number and finding below is invented to show what the deliverable looks like. The usability principles and the accessibility criteria are real. It is not a real engagement.

Product	Thalpos (fictitious), an electricity supplier selling to households in Greece
Website	thalpos.example (a reserved example domain, not a real site)
Journey	"Switch to Thalpos": a new household customer applies online for an electricity contract
Screens	9 of the 10 the audit allows, agreed before the clock started
Material	Four weeks of the supplier's web analytics and support tickets, shared by the client (invented for this sample)
Date	Sample — not a real engagement
Reviewer	Matthaios Mantzios, UXellence
Service	UX audit of one journey, five working days, €1,200 plus value added tax (VAT)

Who this report is for

Three people will read it, and each needs a different part:

- **Whoever owns the sign-up journey** needs section 1, where the numbers are, and section 5, where the order is.
- **Your developers and designers** need section 4. Every finding names the screen, says what we saw and names the usability principle it breaks, so there is no argument about what to change.
- **Whoever has to ask for the budget** needs section 6. It is one page, and it is written to be read aloud in a meeting.

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1. Summary: where the journey loses people

Of 100 people who start the application, 22 finish it. Inside the application, most of the loss happens on four screens, and the reasons are visible without testing with users. We found **11 findings** across the nine screens. Three of them, fixed first, would change the number; they are on one page in section 6.

The funnel below is the sequence of screens from the plans page to the confirmation, with the number of sessions that reached each one in the four weeks you shared with us. We write "people" for sessions throughout; one session is one attempt. "Drop-out" is the share of people who reached a screen and did not reach the next.

Screen	Sessions reaching it	Reach the next screen	Drop-out on this screen
S1 Plans	12,400	55%	45%
S2 Plan detail and estimate	6,820	36%	64%
S3 Supply number and address	2,480	77%	23%
S4 Personal details	1,910	82%	18%
S5 Phone verification	1,560	72%	28%
S6 Document upload	1,120	71%	29%
S7 Contract and consents	790	77%	23%
S8 Payment method	610	89%	11%
S9 Confirmation	540	—	—

The browsing screens, S1 and S2, lose people who are comparing suppliers and have not decided. That loss is normal, and we comment on it only where the screen makes the decision harder than it needs to be (J-01, J-02). The application proper starts on S3. From there, 2,480 people started and 540 finished: 22 in 100.

Two more figures shape the order of the fixes. **71 in 100 applications start on a phone** (1,760 of 2,480), and phones finish at half the desktop rate: 17 in 100 on a phone (300 of 1,760) against 33 in 100 on desktop (240 of 720). And of the **212 support tickets** tagged "online application" in the same four weeks, 96 ask what happens after the application, 58 report a failed document upload and 31 report a problem with the code sent by SMS. The form is generating its own support load.

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2. The journey and its nine screens

Agreed with you before the five days started. One screen means one distinct layout; the plan detail page counts once, whichever of the three plans is open. The journey has nine distinct layouts, so the tenth slot went unused. The price is the same, and the review went deeper on what was there.

#	Screen	What it does
S1	Plans	Lists the three household plans with a "Choose" button each
S2	Plan detail and estimate	Shows one plan's prices and a monthly cost estimate; "Apply" starts the application
S3	Supply number and address	Asks for the supply number from the current bill and the supply address
S4	Personal details	Name, tax number (ΑΦΜ), phone, email, contact preferences, previous supplier
S5	Phone verification	A six-digit code sent by SMS must be entered to continue
S6	Document upload	Identity document and a recent bill from the current supplier
S7	Contract and consents	Contract summary and five checkboxes
S8	Payment method	Direct debit or payment of each bill

#	Screen	What it does
S9	Confirmation	"Application received"

The journey was reviewed in Greek, the language the screens are written in. Labels are quoted in Greek with a translation.

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3. How we reviewed

A heuristic evaluation. A heuristic evaluation is a review by a user experience (UX) specialist, without users, in which each screen is checked against a published set of usability principles, called heuristics. We used the ten heuristics published by Jakob Nielsen at Nielsen Norman Group (NN/g): visibility of system status; match between the system and the real world; user control and freedom; consistency and standards; error prevention; recognition rather than recall; flexibility and efficiency of use; aesthetic and minimalist design; help users recognize, diagnose, and recover from errors; and help and documentation (Nielsen, "10 Usability Heuristics for User Interface Design", nngroup.com). Each finding names the heuristic it breaks by its number and name.

We walked the journey end to end four times: on a laptop in Chrome and Firefox, and on a phone in Safari on iOS and Chrome on Android, each time as a new customer with a real-looking bill in hand. Where a screen behaved differently on a phone, the finding says so.

A walk through the funnel. We laid the four weeks of analytics you shared over the nine screens (section 1) and read each screen's drop-out next to what we saw on it. The analytics say where people leave. The review says why. We also read the 212 support tickets tagged "online application" from the same weeks and counted what they were about. Where a finding has a number behind it, the number is in the finding.

What this review did not do. No users took part. The accessibility checks are limited to what stopped us during the walkthrough; two findings cite Web Content Accessibility Guidelines (WCAG) 2.2 success criteria by number, but this is a UX audit, and the screens were not checked for conformance with WCAG 2.2. We did not read code, and we did not review the native app, which has its own sign-up flow.

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4. Findings

Every finding is tied to one screen and to the principle it breaks. Three ratings follow each one.

Impact on users

- **High:** stops people from finishing, or makes a step fail for a large share of them.
- **Medium:** costs people time, a second attempt or a wrong choice, but most get through.
- **Low:** an irritation that few people notice.

Impact on the business

- **High:** visible in the completion rate or the support queue today.
- **Medium:** costs applications or support time, in smaller numbers.

- **Low:** reputation and polish.

Effort to fix, as we estimate it from the outside; your team's own estimate replaces ours.

- **Low:** text, settings or one component, a day or two of a developer.
- **Medium:** one screen's logic or a new component, within one sprint.
- **High:** a change to a back-end service or a third party.

ID	Screen	What we found	Principle	Users	Business	Effort
J-01	S1	The three plans are named Blue, Green and Flex, and the comparison shows only the price per kilowatt-hour (kWh). The fixed monthly charge and the conditions for the discount sit behind a "Details" link on each card. People choose between names that tell them nothing.	2 Match between the system and the real world; 6 Recognition rather than recall	Medium	Medium	Low
J-02	S2	The cost estimate asks for yearly consumption in kWh. A household's bill shows consumption for one billing period, and most people do not know the yearly figure. Anyone who skips the field sees no estimate at all, and "Apply" sits below the empty estimate. Only 36 in 100 go on to S3.	2 Match between the system and the real world; 6 Recognition rather than recall	High	High	Medium
J-03	S3	The supply number field («Αριθμός Παροχής») has no hint saying where the number is printed on the bill. A number of the wrong length returns «Μη έγκυρη τιμή» (Invalid value). 23 in 100 who reach this screen leave on it, the first screen of the application.	10 Help and documentation; 9 Help users recognize, diagnose, and recover from errors	High	High	Low
J-04	S4	Fourteen fields on one screen, including a second contact person and a "previous supplier" list of 40 names. Nothing says which fields are required; the asterisk is explained nowhere.	8 Aesthetic and minimalist design; 5 Error prevention	Medium	Low	Medium
J-05	S4	A failed submit shows one banner at the top, «Ελέγξτε τα στοιχεία σας» (Check your details), and names no field. On a phone the banner is off screen by the time the person reaches the button, so nothing appears to happen. This also fails WCAG 2.2 success criterion 3.3.1 Error Identification (A).	9 Help users recognize, diagnose, and recover from errors	High	High	Low
J-06	S5	The code sent by SMS expires after 60 seconds. The countdown is not shown, and «Αποστολή ξανά» (Send again) stays disabled for 90 seconds. An expired code and a mistyped one return the same «Μη έγκυρος κωδικός» (Invalid code). 28 in 100 leave on this screen, and 31 tickets in four weeks are about the code.	1 Visibility of system status; 3 User control and freedom	High	Medium	Low

ID	Screen	What we found	Principle	Users	Business	Effort
J-07	S6	Upload accepts PDF and JPG up to 2 MB. A phone photo of an identity card can be larger than that, and an iPhone photo is often HEIC, so the upload fails with «Σφάλμα αρχείου» (File error) and no reason. There is no "take a photo" option, although 71 in 100 applications start on a phone. 29 in 100 leave here, and 58 tickets in four weeks report a failed upload.	5 Error prevention; 9 Help users recognize, diagnose, and recover from errors	High	High	Medium
J-08	S7	Five checkboxes of the same weight, all starting «Συμφωνώ» (I agree). Three are required to continue and two are marketing consent, and nothing marks which is which. The error reads «Αποδεχτείτε τους όρους» (Accept the terms). The custom checkboxes cannot be checked by keyboard and show no focus: WCAG 2.2 success criteria 2.1.1 Keyboard (A) and 2.4.7 Focus Visible (AA).	4 Consistency and standards; 5 Error prevention	Medium	Medium	Low
J-09	S8	"Direct debit" is pre-selected, and the International Bank Account Number (IBAN) field stays required after the person switches to "pay each bill". The red error on the empty IBAN field stays until the page is reloaded.	3 User control and freedom; 5 Error prevention	Medium	Medium	Low
J-10	S9	The confirmation reads «Ευχαριστούμε, η αίτησή σας παραλήφθηκε» (Thank you, your application has been received) and stops. No reference number, no next step, no date by which to expect contact. The confirmation email goes out in the next day's batch. 96 of the 212 tickets in four weeks ask what happens next.	1 Visibility of system status	High	High	Low
J-11	S3–S8	The six application screens show no step count and no progress. The browser's Back button returns to the previous screen with its fields emptied.	1 Visibility of system status; 3 User control and freedom	Medium	Medium	Medium

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5. Ranked by impact and effort

Ordered by impact on users first, effort second and impact on the business third: a finding that is cheap to fix and changes the completion rate comes before one that needs a sprint. Where two findings tie, the one with a support-ticket count behind it goes first, because that cost is already being paid.

Rank	ID	The change, in one line	Users	Business	Effort
1	J-10	Give the confirmation a reference number, the next steps and an immediate email	High	High	Low

Rank	ID	The change, in one line	Users	Business	Effort
2	J-05	Show each error next to its field, saying what to enter	High	High	Low
3	J-03	Show where the supply number is on the bill, with an example	High	High	Low
4	J-06	Show the code's countdown, allow a new code at once, and say when a code has expired	High	Medium	Low
5	J-07	Accept phone photos, add "take a photo", and say why a file was refused	High	High	Medium
6	J-02	Estimate from the last bill's amount, or from household size, instead of yearly kWh	High	High	Medium
7	J-09	Make the IBAN field required only when direct debit is chosen	Medium	Medium	Low
8	J-08	Separate the required consents from the marketing ones, and make the checkboxes work by keyboard	Medium	Medium	Low
9	J-01	Put the monthly charge and the discount conditions on the plan cards, and name plans by who they suit	Medium	Medium	Low
10	J-11	Add a step indicator and keep entered data on Back	Medium	Medium	Medium
11	J-04	Cut S4 to the fields the contract needs; move the rest to the account	Medium	Low	Medium

Ranks 1 to 4 are text, settings and one component each. A developer who has the week could clear all four before the next release. Ranks 5 and 6 need a sprint each and are the two that would move the completion rate most.

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6. The three changes to make first

One page, for whoever has to argue for them. Each change has the finding behind it, the number that makes the case, what it costs and how you will know it worked.

1. Tell people what happens next. (J-10, screen S9)

Change: show a reference number and the three steps that follow, with the date by which each happens, and send the confirmation email at once instead of in the next day's batch.

The case: 96 of the 212 application tickets in four weeks ask a question this page could answer. Nielsen's first heuristic, visibility of system status, is the one it breaks.

Cost: low. One page template and one email trigger.

You will know it worked when the weekly count of "what happens with my application" tickets falls. Count them now, before the change.

The line for the meeting: "Nearly half of our application tickets ask a question the confirmation page could answer."

2. Make the form say what is wrong and where. (J-05 and J-03, screens S3 and S4)

Change: put every error message next to its field and have it say what to enter. Keep the banner at the top

as a summary that links to each field. On S3, add a hint under the supply number field with a picture of a bill and the number circled.

The case: S3 and S4 together lose 37 in 100 of the people who start the application (2,480 reach S3, 1,560 reach S5), and neither says what to enter when the person gets it wrong. The banner on S4 also fails WCAG 2.2 success criterion 3.3.1. The heuristic is number 9, help users recognize, diagnose, and recover from errors.

Cost: low. Message text, one error component used on both screens, one image.

You will know it worked when the share reaching S5 from S3 rises from 63 in 100.

The line for the meeting: "Two screens lose more than a third of our applicants between them, and neither tells them which field is wrong."

3. Let the phone path finish. (J-07, screen S6)

Change: accept PNG and HEIC as well as JPG and PDF, compress photos on the device or raise the 2 MB limit, add a "take a photo" option on phones, and say why a file was refused.

The case: 71 in 100 applications start on a phone, and phones finish at half the desktop rate (17 against 33 in 100). S6 loses 29 in 100 of the people who reach it, and 58 tickets in four weeks report a failed upload. Heuristic 5, error prevention.

Cost: medium. One sprint for the upload component; no back-end change if compression happens on the device.

You will know it worked when the share reaching S7 from S6 rises from 71 in 100, measured for phones on their own.

The line for the meeting: "Seven in ten of our applicants are on a phone, and the upload step is built for a scanner."

Fourth in the order is the SMS code (J-06). It is cheap, and it sits on the screen that loses the second-most people inside the application, after the upload. Take it in the same release if there is room.

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7. The 30-minute call

One call to walk through this report with the people who will act on it.

Who should join: the owner of the sign-up journey, the developer or team lead who will make the changes, and whoever runs the support queue.

What we cover:

- the three changes in section 6, and the number to record before each one ships;
- the order in section 5, and anything in it that conflicts with your release plan;
- the four findings rated Medium effort (J-02, J-04, J-07, J-11), and what to decide before starting them;
- what this audit does not cover, and what to do about that.

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8. What this audit is not

- **Not a usability test.** No users took part. The findings come from a specialist's review against published principles and from your own numbers. Where a finding needs evidence from users before your team

will act on it, that is a usability test, and we say which findings those are at the call.

- **Not an accessibility audit.** Two findings cite WCAG 2.2 success criteria because the fault stopped us during the walkthrough. The screens were not checked for conformance with WCAG 2.2, and this report makes no statement about it.
- **Not a redesign.** We say what to change and in what order. The new screens are design work, and that is a separate engagement.
- **Not the whole product.** One journey, nine screens, the web version. The native app, the "move house" journey and the existing-customer area were out of scope.

9. What happens next

- **If you want the whole product reviewed**, that is the full UX audit: fixed scope, two to three weeks, quoted after a discovery call. The €1,200 you paid for this audit is credited against it, with no time limit.
- **If a finding needs evidence from users**, a focused research study can follow. **If the findings point to new screens**, a design project can.

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