



B2B SaaS UX Audit Guide

Our guide to improving your
digital product's user experience

SCENIC WEST DESIGN, LLC.

Product Strategy & UX Design
For Your Next Big Idea

www.scenicwest.co
team@scenicwest.co

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SCENIC WEST DESIGN

Your on-demand team of Product Strategists and UX/UI Designers that create user-centered product experiences that scale.

WHO WE ARE

Consider us your go-to team of senior-level UX/UI Designers and Product Strategists. We are able to flex to your SaaS product team's needs whether you're looking to design a new product or feature, improve an existing user experience, or extend your team for ongoing Agile design support.




We offer fractional, part-time or full-time UX design and product strategy consulting to ensure teams are making the most of analytics, UX research, and product validation to set your SaaS up for success.

By partnering with Scenic West, you can enhance your existing product team without the hassle of hiring in-house.

WHAT WE DO

- ▶ UX DESIGN
- ▶ PRODUCT STRATEGY
- ▶ UX RESEARCH
- ▶ DESIGN SPRINT
- ▶ UX AUDIT
- ▶ PRODUCT DISCOVERY
- ▶ E-COMMERCE CRO AUDIT

WHERE TO FIND US

-  www.scenicwest.co
-  team@scenicwest.co
-  Chattanooga, TN



INTRODUCTION

B2B SAAS UX AUDIT GUIDE



Prepping your B2B SaaS product to support your desired growth trajectory is essential to scaling your business. Your increased volume of users and sales means that you've likely found product-market fit, but it also may mean that you're seeing some holes in your initial product user experience.

Investing in user experience design should be ongoing, but we've created this UX audit guide to help you jump-start your UX improvement backlog with both quick wins that deliver high ROI and larger opportunities to consider for your roadmap ahead.

Improve your in-app product onboarding experience, frame dashboards and navigation around user priorities, and reduce friction or the number of clicks in key user workflows to reduce customer service operational costs and increase customer retention. These investments will also help you sell more subscriptions or licenses by making your product shine in free trials or product demos.

We will walk you through a condensed version of our team's process for conducting full UX audits for clients so you can go through a quick version of our exercise with your own team to generate a backlog of high ROI quick wins.



Our Process

Before you begin working through our checklist, there are a few things we want you to keep in mind to achieve the best results.

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OUR PROCESS



Grab a pen and paper or your favorite digital notebook and get ready to dive into optimizing your B2B SaaS product!

REVIEW THE UX AUDIT CHECKLIST PROVIDED

- We recommend reading through this full guide first, then follow with an initial walkthrough of your SaaS product, taking notes on the provided UX audit checklist as you go to begin brainstorming.
- Don't worry too much about organizing and tagging notes in your first pass. Focus on capturing any onboarding pain points or opportunities that come to mind for each item on the checklist. We'll organize and prioritize opportunities later.
- For optimal insight, ask your team to complete the same exercise. Gather to share results and findings.

REVIEW CURRENT PRODUCT ANALYTICS

- Gather current product Key Performance Indicators (KPIs).
- Some metrics may include but are not limited to:
 - DAU to MAU Ratio
 - Retention / Churn Rates
 - Adoption Rate
- Review user activity across different devices.
- How do mobile and desktop compare?
- How should that shape your focus when conducting the UX review?

IDENTIFY TOP PRIORITIES AND OPEN QUESTIONS

- Based on your current product analytics, what are your team's top priorities for improvement? Do you have any open questions that may warrant further investigation?
- When conducting your UX audit following our checklist, pay special attention to opportunities that would have the most impact on your top priorities.
- If you've identified open questions, brainstorm ways to gain additional insights to make educated decisions about what product enhancements to prioritize. Open questions can often be answered by conducting user research, reviewing analytics, or talking with your sales/customer service teams.

CONDUCT A SMALL SET OF USER RESEARCH

- While you're well-versed in your app's user flow, others may not be. Now's the perfect time to observe several people attempting to go through product onboarding for the first time. Take notes as you watch and incorporate those insights into your UX audit!
- Try unmoderated user testing. There are a variety of platforms that help you create task prompts, recruit participants, and then provide a video. If you're new to this research method, reach out and we'd be happy to help your team.
- We typically start with 10 user tests, splitting across mobile and desktop breakpoints that mirror device traffic. For example, 7 mobile tests and 3 desktop tests if you have mostly mobile traffic.
- Add demographic screening questions that mirror your audience in terms of age range, income, etc. Different platform offer different options for this, so have your user personas and screening needs in mind when selecting a platform if you don't already have one.

CAPTURE SCREENSHOTS OF KEY PAGES AND UI STATES

- Capture screenshots of key pages and UI states of your product experience to use as your foundation for identifying and prioritizing product opportunities.
- Be sure to include mobile and desktop breakpoint screenshots!

ADD ANNOTATIONS TO YOUR SCREENSHOTS

- Now that you've captured screenshots, take another pass through your key screens and UI states to add annotations. The Scenic West team loves to use Figma for organizing and annotating screenshots, but any tool your team is comfortable with can work.
- Building on your initial notes, pay special attention to product opportunities that address gaps identified in analytics or user research. Which ones would have the most positive impact on your KPIs?

REVIEW ANNOTATIONS FOR QUICK WINS

- Tag opportunities for your team that are low-level in effort, but high return on investment (ROI).
- You can tag items as you go and flag ones that warrant team discussion.
- Highest priority = low-effort and high-value

DEBRIEF WITH YOUR TEAM

- Schedule a time with your team to review findings and align on opportunities. Update prioritization tags as you review together or consider a second exercise to rank business value and level of effort to generate a more formal prioritization matrix. Discuss next steps before leaving the meeting.



UX Audit Checklist

Here's a sample list of things we look for when reviewing B2B SaaS products like yours.

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UX CHECKLIST



Here's a sample list of things we look for when reviewing B2B SaaS products like yours. While walking through this checklist, take note of missing pieces and opportunities for improvement.

SELF-SERVICE ONBOARDING EXPERIENCE

- Account sign up / purchase experience - free trial, on-demand demo videos, online purchase, option to talk to sales if desired
- Clear path to value and ease of completing key tasks for first-time users
- Natural flow through required setup tasks
- Contextual support relevant to each step of the onboarding process
- New user UI states - onboarding checklists, empty states with guidance, etc.
- Additional training content is available via learn more links, knowledge center, chat
- Access to the customer support team if in-app help and guidance doesn't answer the user's questions

SEARCH

- Prominence of search / appropriateness for app context
- Global search functionality
- Auto-suggest functionality
- Search filters
- Quality of search results
- Pathway to complete key tasks from search

DASHBOARD / HOME SCREEN

- Clear first impression - what does the product do and who is it for?
- First-time user path to successfully completing their first meaningful task
- Return user pathways
- Clear path to top tasks a user will want to complete on log in
- Usefulness of dashboard content / user engagement
- Personalization
- Mobile experience for forms, data reports, and navigation
- Discoverability of help / knowledge center resources
- Page load speed
- Loading UI states

BRAND / MARKETING

- Look and feel / overall design aesthetic
- Product marketing website
- Subscription pricing model
- Sales customer journey
- Knowledge center, training videos, webinars, etc.
- Social media profiles / content
- Consistency / continuity across all brand experiences in and out of app

NAVIGATION

- Ease of navigation / intuitive organization
- Mobile navigation
- Use of header space - branding, search, sub-navigation, CTAs
- Placement of customer support - chat, knowledge center, etc

FORMS, DATA TABLES, & REPORTS

- Clear form labels, headings, CTAs, progress indicators, and error/success states
- Responsive forms and data tables
- Error prevention - contextual guidance/help text, inline error handling, validation
- Sorting and filtering for tables
- Data table column customization if appropriate
- Data table actions and bulk actions
- Easy to understand data visualizations - labels, headings, hover states, legibility
- Data visualization page load speed

The image shows a 'Create an Account' form with the following elements:

- Title:** Create an Account
- First Name:** Input field with placeholder text 'Your First Name'.
- Last Name:** Input field with placeholder text 'Your Last Name'.
- Email:** Input field with placeholder text 'Your Email Address'.
- Phone Number:** A combined field with a country code dropdown (currently '+234') and a text input containing '8023456789'.
- Account Type:** A dropdown menu with 'Select' as the current selection.
- Terms and Conditions:** A checked checkbox followed by the text 'I hereby accept the T&C of Liquid'.
- CTA:** A blue 'Sign Up' button.

ACCESSIBILITY

- Product meets organization's WCAG accessibility requirements/goals. If you feel you have significant gaps in this area, consider a separate thorough accessibility audit.
- Good color contrast and font sizes for readability
- Image alt tags
- Form input labels and HTML coding support keyboard tabbing and screen readers if required
- Data tables and related actions support keyboard tabbing and screen readers if required
- Clear error messaging and context to help prevent errors
- Video, if applicable, includes captions and/or transcription
- Mobile friendly

SHARING / COLLABORATION

- Reports or insights are easy for core users to share with relevant people
- Collaboration features add value and efficiency to user workflows
- UI feedback provides transparency - who comments are from, who's editing/viewing, assigned action items, etc.

USER MANAGEMENT

- Clear user roles and their associated permissions
- Easy to add, edit, and delete users and related permissions



Final Thoughts

Now that your backlog is full of bright ideas, let's put it to work.

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SUMMARY



TAKEAWAY 1

Regular UX audits help you reflect on your current KPI metrics and identify opportunities for product improvement.

TAKEAWAY 2

In addition to a UX review of the SaaS product, it's also a great time to conduct some user research to understand customer thinking where you have open questions.

TAKEAWAY 3

Once you've identified a list of prioritized opportunities, work with UX/UI designers and developers to implement your top quick wins and start planning for larger opportunities.





Do you have a busy team with a big deadline?

Hiring in-house is a hassle, and we know you're busy. Let us do the work for you so you can make the most out of the upcoming year.

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Work With Us

At Scenic West, we're an on-demand team of Product Strategists and UX/UI Designers who are passionate about creating user-centered product experiences that scale. With our expertise and diverse experience, we help SaaS and E-commerce teams lift conversion rates, maximize ROI, and streamline user experience.

We've Been Trusted By

Small startups like AmiGo to large Fortune 500s like Intel. We work with a wide range of SaaS companies in Healthcare, Finance, Education, Insurance, HR, and more to create cross-device user experiences that maximize engagement and conversion rates.



ORDWAY

intel.



attn:



“ Scenic West’s B2B SaaS and FinTech UX expertise and flexible, fractional startup UX/UI design support was the perfect fit for my growing company. I was able to save money by not hiring full-time UX designers, but still had a long-term UX partner for all of our team’s needs throughout a platform redesign and new feature launches.

Sameer G., CEO at Ordway Labs



Thank You

Get in Touch:

<https://www.scenicwest.co/contact-us>

[Schedule a Call](#)

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