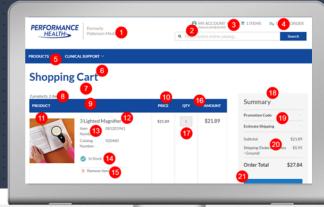
## Performance Health Heuristic Evaluation

#### Cart and Checkout (B2C Desktop Inflection)

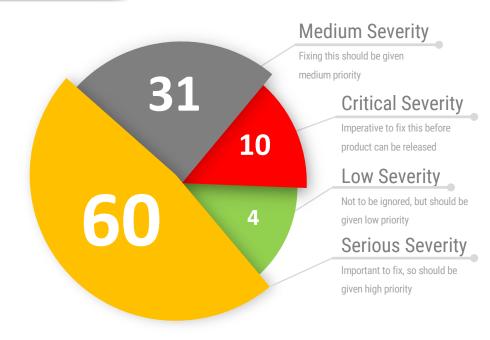


### Purpose of the Heuristic Evaluation (7% complete)

The purpose of this Heuristic Evaluation is to expose the 105 extensive UX opportunities to increase conversion, customer acquisition, user satisfaction, and the overall Performance **ISSUES** & COUNTING... Health digital experience

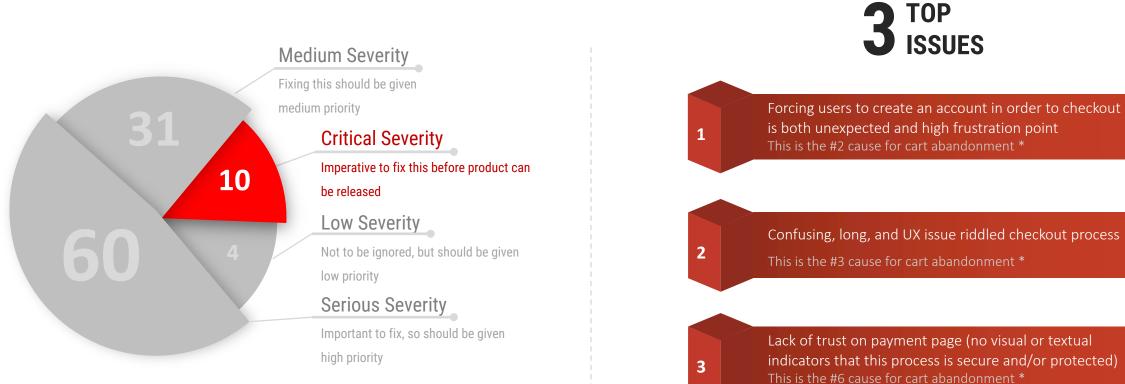
#### Severity Examples

Critical: No guest checkout option exists. No payment security Serious: Inadequate form field usage, instructions, and validations Medium: Inconsistent voice, naming conventions, and visual treatments Low: Unnecessary copy and imagery. Page element layout



# Performance Health Heuristic Evaluation

Cart & Checkout (B2C Desktop Inflection)



\* Baymard Institute Study on Cart Abandonment https://baymard.com/blog/checkout-flow-average-form-fields

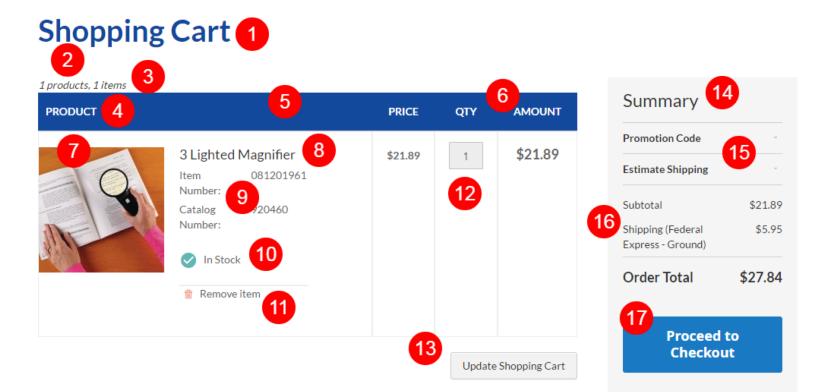
#### CART - NEW / LOGGED OUT CUSTOMER

- Issue: Unnecessary copy increases cognitive load Recommendation: The term "Cart" is sufficient Severity: Low
- 2. Issue: Too much white space removes affordance Recommendation: Reduce white space by moving product module up Severity: Low
- 3. Issue: Redundant, unclear, and incorrect copy confuses users Recommendation: Remove copy Severity: Med
- 4. Issue: Incorrect grammar and sub optimal word choice Recommendation: Use "Description" Severity: Low
- 5. Issue: The bar's visual hierarchy is poor Recommendation: Reduce saturation Severity: Serious
- 6. Issue: Term is unclear and confusing Recommendation: Use "Total" instead or remove entirely Severity: Med
- 7. Issue: No indication that image is clickable Recommendation: Provide message/CTA to user Severity: Med
- 8. Issue: No indication that text is clickable Recommendation: Provide a clear site wide pattern for text links Severity: Serious
- 9. Issue: Are either numbers useful or relevant to the user here? Recommendation: Remove, if not Severity: Med

**Issue:** Scan-ability is poor; unnecessary copy **Recommendation:** Remove "Number" and better align data values **Severity:** Med

- Issue: Some items reflect check icon but no copy Recommendation: Provide clarity to user Severity: Serious
- 11. Issue: Unnecessary copy Recommendation: Remove "item" Severity: Low

Issue: No option for user to save an item to their list Recommendation: Provide add to list functionality Severity: Serious



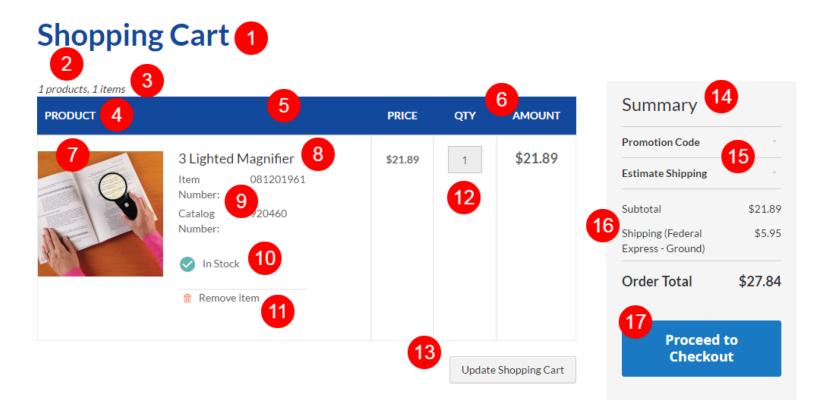
#### CART - NEW / LOGGED OUT CUSTOMER (Cont.)

- Issue: No option for user to save an item to their list Recommendation: Provide add to list/save for later functionality Severity: Serious
- 13. Issue: Too much friction for user to update quantity; location not optimal
   Recommendation: Provide a stepper or other responsive design pattern; swap location with price column
   Severity: Med
- 14. Issue: Action is not grouped with function Recommendation: Also provide update option near QTY field Severity: Med
- 15. Issue: Insufficient details
   Recommendation: Update to read "Order Summary"
   Severity: Med
- **16. Issue:** Insufficient CTA and unclear copy **Recommendation:** Improve link CTA and text voice **Severity:** Serious
- **17. Issue:** Font treatment provides poor visual hierarchy **Recommendation:** Improve entire Summary module IA/VD **Severity:** Med

**Issue:** Unnecessary and insufficient copy **Recommendation:** Provide a user centric term and include days to arrival **Severity:** Med

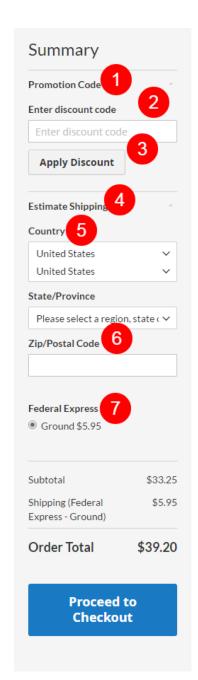
18. Issue: Insufficient CTA and location

**Recommendation:** Move this to the top of the visual hierarchy; duplicate button at top of page; change to "Checkout Now" **Severity:** Serious



#### CART / Expanded Promotion Code & Estimate Shipping

- Issue: Copy is not directive Recommendation: Update to read "Apply Discount" or "Apply Promo Code" Severity: Med
- Issue: Redundant copy; inconsistent copy Recommendation: Use label or helper text (with float label) not both Severity: Med
- **3. Issue:** Inconsistent naming convention **Recommendation:** Use one term consistently (e.g., Discount) **Severity:** Med
- Issue: Insufficient direction to user Recommendation: Update to read "...Shipping Cost" Severity: Med
- 5. Issue: Form element is unnecessary, as there is one option Recommendation: Remove entirely, or surface "United States" as read only Severity: Serious
- 6. Issue: Too much user friction for action Recommendation: Ask for zip only; remove state and country Severity: Serious
- 7. Issue: Entire section is superfluous Recommendation: User has no option for other shipping method, so remove it. Surfacing under subtotal is sufficient Severity: Serious

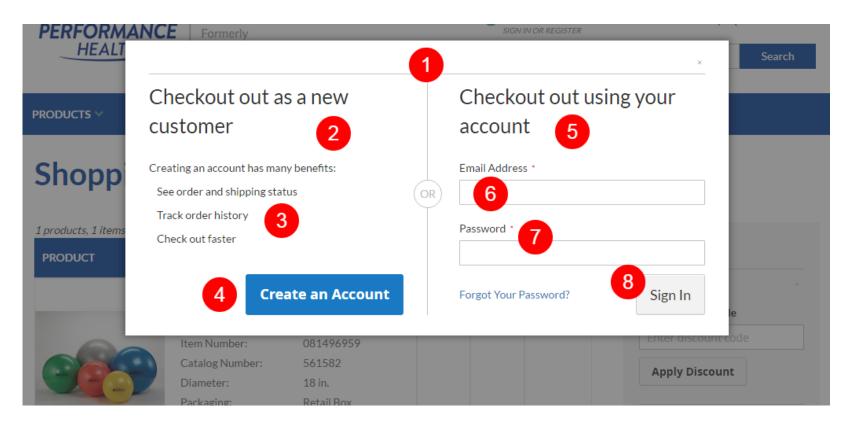


#### CHECKOUT - NEW / LOGGED OUT CUSTOMER (Step 1)

 Issue: Forcing users to create an account is the #1 cause for loss of conversion and a way to alienate users Recommendation: Allow guest checkout Severity: Critical

**Issue:** Unexpected results after selecting checkout button **Recommendation:** Place users in the checkout flow immediately; suggest account creation post order **Severity:** Critical

- Issue: Not allowing user to enter data on this page to move forward; removing user from checkout flow Recommendation: Surface the minimum requirements (i.e., email/password) within this modal Severity: Critical
- Issue: Unnecessary information that is business not user centric. User was expecting to buy a product and not asking for account creation benefits Recommendation: Remove Severity: Serious
- 4. Issue: Unexpected, unclear, and unrequested CTA Recommendation: Remove Severity: Critical
- Issue: Excessive and unnecessary copy Recommendation: Update copy to read "Sign in to checkout" Severity: Serious
- 6. Issue: Unnecessary copy Recommendation: Update copy to read "Email" Severity: Serious
- Issue: Unclear usage of red asterisks Recommendation: Change to read "Required" or offer clarity to user Severity: Serious
- 8. Issue: Inconsistent CTA and button pattern Recommendation: Arrive at a button pattern that is consistent Severity: Serious



#### CHECKOUT – NEW CUSTOMER (Step 2)

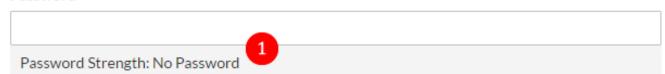
- Issue: User frustration occurs when forced down a path they did not choose Recommendation: Frame this as part of checkout Severity: Critical
- Issue: Unnecessary labels increase cognitive load Recommendation: Remove label and combine with other fields Severity: Serious
- **3. Issue:** Unclear usage of red asterisks **Recommendation:** Change to read "Required" or offer clarity to user by stating that all items are required **Severity:** Serious
- Issue: Unnecessary items in the flow affect conversion Recommendation: Move newsletter sign up to order submit page Severity: Serious
- Issue: Unnecessary labels increase cognitive load Recommendation: Remove label and combine with other fields Severity: Serious
- 6. Issue: No fail safe if user enters incorrect email address Recommendation: Introduce a confirm email address field Severity: Serious
- 7. See Password Slide
- 8. Issue: Forcing user to complete unnecessary fields Recommendation: Remove field Severity: Serious
- Issue: User frustration occurs when forced down a path they did not choose
   Recommendation: Integrate this process within the checkout flow or, at minimum, frame this as part of checkout by updating the button copy
   Severity: Serious

| Personal Information 2<br>First Name • 3<br>Last Name •<br>Sign Up for Newsletter 4<br>Sign-in Information 5<br>Email • 6<br>Password •<br>Password Strength: No Password 7 |
|---|
| Last Name •<br>Sign Up for Newsletter 4<br>Sign-in Information 5<br>Email • 6<br>Password •   |
| Sign Up for Newsletter 4<br>Sign-in Information 5<br>Email • 6<br>Password •  |
| Sign Up for Newsletter 4<br>Sign-in Information 5<br>Email • 6<br>Password •  |
| Sign-in Information 5<br>Email • 6<br>Password •  |
| Email • 6 Password •  |
| Password *  |
|   |
| Password Strength: No Password 7  |
|   |
| Confirm Password * 8  |
|   |
| Create an Account   |

#### **CHECKOUT – PASSWORD MODULE**

- 1. **Issue:** Provides no direction to user only tells them they failed **Recommendation:** Surface password requirements **Severity:** Serious
- Issue: Copy is unnecessarily long and tech speak causing cognitive load
   Recommendation: Write in natural language and be brief Severity: Serious
- 3. Issue: Password requirements change after meeting initial requirements causing confusion and frustration **Recommendation:** Surface all password requirements upfront. This is not the place for progressive disclosure **Severity:** Critical
- Issue: No indication that confirm password was entered successfully; no option for user to show password increases error frequency and frustration Recommendation: Provide visual/textual feedback when user enters the correct matching password Severity: Critical

#### Password \*

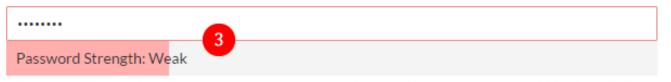


#### Password \*



Minimum length of this field must be equal or greater than 8 symbols. Leading and trailing spaces will be ignored.

#### Password \*



Minimum of different classes of characters in password is 3. Classes of characters: Lower Case, Upper Case, Digits, Special Characters.

#### Confirm Password \*



#### CHECKOUT – NEW CUSTOMER (Step 3)

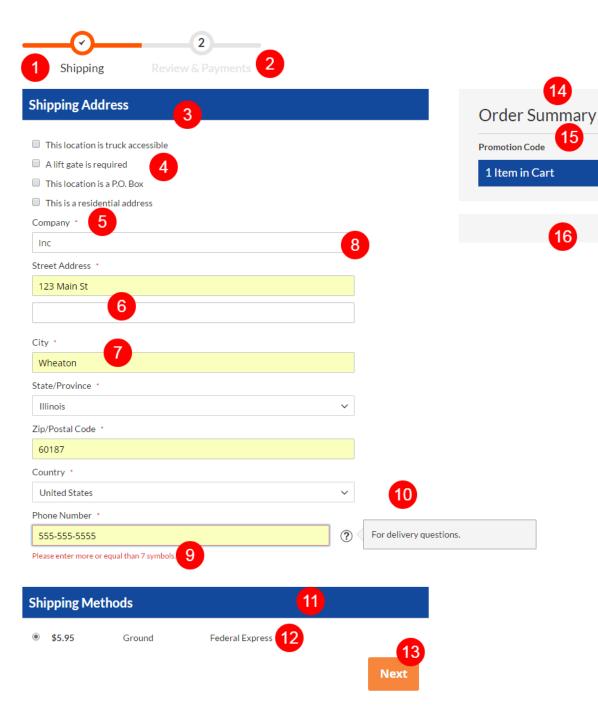
- 1. **Issue:** Checkmark communicates a completed task and orange is associated with an error/warning thus adding confusion Recommendation: It's step one, so use a one; change color Severity: Serious
- Issue: The order of words and grammar are incorrect; passive voice **Recommendation:** Update copy to read "Payment and Order Review" 2. or the like Severity: Med
- 3. Issue: The bar's visual hierarchy is poor Recommendation: Reduce saturation or modify visuals entirely Severity: Serious
- **Issue:** Surfacing options that are not used by all users adds cognitive load; location of items are non optimal **Recommendation:** If 80% of users are not leveraging all these options, do not surface be default. PO Box should simply be entered in the address field. The system should define it an address is 4. residential Severity: Serious
- **Issue:** Unclear usage of red asterisks **Recommendation:** Change to read "Required" or offer clarity to user 5. by stating that all items are required Severity: Serious
- 6. Issue: No indication to user what should be entered on line one or two; is line two optional? **Recommendation:** Provide instructional details to users; only surface line two when a user needs it. Leverage an address completion API (e.a., Google Address Lookup API) Severity: Serious
- 7. **Issue:** User is forced to enter data that the system could complete: increase of friction. If only country is United States then remove entirely or simply default it / make read only Recommendation: Place zip code field first and auto populate city / state. Severity: Serious
- **Issue:** Same length form fields provide no insight to user around the requested data; translates into more work for user 8. **Recommendation:** Change form field lengths to reflect the data that will reside within Severity: Med

Issue: Company field is required even if I select residential address Recommendation: Remove this requirement Severity: Serious

| <b></b>              |                         |                    |                  |                |
|----------------------|-------------------------|--------------------|------------------|----------------|
| 1 Shipping           | g Revie                 | ew & Payments 2    |                  |                |
| Shipping Ado         | dress                   | 3                  |                  | 0rder Summary  |
| This location is     | s truck accessible      |                    |                  | Promotion Code |
| A lift gate is re    | equired 4               |                    |                  | 1 Item in Cart |
| This location is     | s a P.O. Box            |                    |                  | Intennin Cart  |
| This is a reside     |                         |                    |                  |                |
| Company *            | 5                       |                    |                  |                |
| Inc                  |                         |                    | 8                | 16             |
| Street Address •     |                         |                    |                  |                |
| 123 Main St          |                         |                    |                  |                |
|                      | 6                       |                    |                  |                |
| City *               | 6                       |                    |                  |                |
| Wheaton              |                         |                    |                  |                |
| State/Province •     |                         |                    |                  |                |
| Illinois             |                         |                    | ~                |                |
| Zip/Postal Code      | •                       |                    |                  |                |
| 60187                |                         |                    |                  |                |
| Country *            |                         |                    |                  |                |
| United States        |                         |                    | ~ 10             |                |
| Phone Number *       |                         |                    |                  |                |
| 555-555-5555         |                         | _                  | ? For delivery q | uestions.      |
| Please enter more or | r equal than 7 symbols. | 9                  |                  |                |
| Shipping Me          | thoda                   |                    | 11)              |                |
| shipping we          | thous                   |                    |                  | I              |
| \$5.95               | Ground                  | Federal Express 12 |                  |                |
|                      |                         | •                  | 13<br>Next       |                |

#### CHECKOUT - NEW CUSTOMER (Step 3) (Cont.)

- 9. Issue: Error/alert message is unclear and tech speak Recommendation: Write in natural language and be clear Severity: Serious
- **10. Issue:** Hiding pertinent information provides no value to user **Recommendation:** Surface this information following the form label or under the field **Severity:** Med
- Issue: The bar's visual hierarchy is poor Recommendation: Reduce saturation or modify visuals entirely Severity: Serious
- 12. Issue: Entire module has no functional use to the user; Serious chance for confusion
   Recommendation: If the user has no options, do not use form elements. Make read only; update visual treatment
   Severity: Serious
- Issue: Unclear messaging increases cognitive load Recommendation: Change to read "Continue to Payment and Order Review".
   Severity: Serious
- 14. Issue: Module appears broken, as there is no summary displayed. Also cart page has "Summary" and here it says "Order Summary" causing confusion
   Recommendation: Surface order summary items or a clear CTA for a user to access it. Be consistent with copy Severity: Serious
- 15. Issue: Promotion code interaction is not clear; looks like a label for "1 Item in Cart"
   Recommendation: Improve the layout, structure, and visual elements
   Severity: Serious
- **16.** Issue: Empty boxes make site look broken and erode user trust
   **Recommendation:** Remove Severity: Med



#### CHECKOUT – NEW CUSTOMER (Step 4)

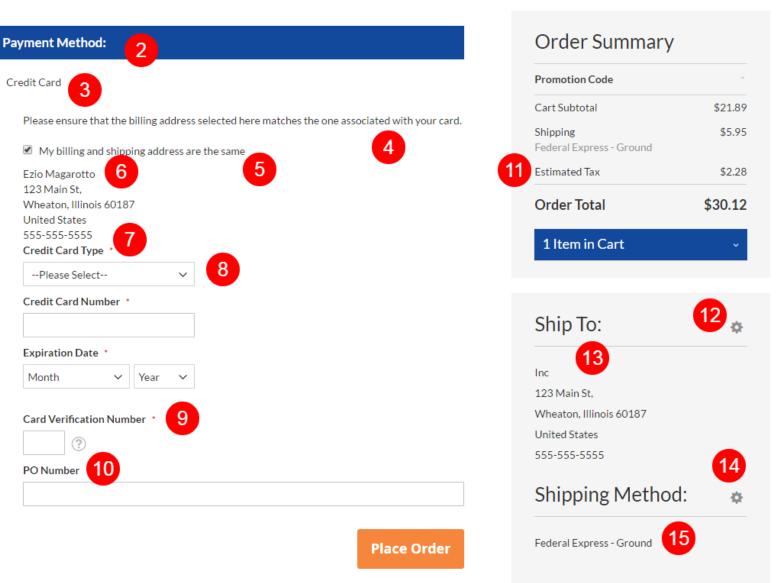
 Issue: No option for user to make edits to shipping; no clear link Recommendation: Provide a back or edit option for user Severity: Serious

**Issue:** Checkmark communicates a completed task and orange is associated with an error/warning thus adding confusion

**Recommendation:** It's step one, so use a one; change color **Severity:** Serious

- Issue: The bar's visual hierarchy is poor Recommendation: Reduce saturation or modify visuals entirely Severity: Serious
- 3. Issue: Label is disconnected from content and provides no information or direction to user; font treatment is non optimal **Recommendation:** Improve layout and structure of this entire module to provide direction and segmentation to user **Severity:** Serious
- 4. Issue: Unnecessary, redundant, and unclear copy Recommendation: Remove entire line Severity: Med
- Issue: Unnecessarily long copy; page location non optimal. Identify what data points NEED to be captured (i.e., is name or street address needed?)
   Recommendation: Use "Use for Billing" checkbox on shipping page. If collecting zip code is enough (akin to when using a credit card to purchase fuel at a station), then ask for that only. Should also leverage an address auto lookup via Google API or the like Severity: Med
- 6. Issue: What value does this copy provide to the user? Does it assist them in placing the order? The visual treatment is non optimal; no whitespace; no grouping **Recommendation:** Only surface when user selects it or only display name and zip code by default. Increase whitespace around this segment and provide a label or visual separator **Severity:** Med
- 7. Issue: Unclear usage of red asterisks Recommendation: Change to read "Required" or offer clarity to user by stating that all items are required Severity: Serious





#### CHECKOUT – NEW CUSTOMER (Step 4) (Cont.)

8. **Issue:** Forcing user to complete tasks the system can easily perform; drop down does not provide sufficient direction; extraneous hyphens used

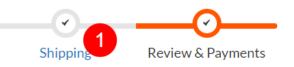
**Recommendation:** Remove drop down entirely. Have system check and display an icon of the card based on the number entered (this is an easy JavaScript fix). Consider using an input mask for credit card capture Severity: Serious

**Issue:** No visual or textual indicators that this process is secure and/or protected. This miss has a significant influence on user trust and conversion loss **Recommendation:** At minimum provide both textual and visual elements which speak to both protecting and securing the user's payment details and transaction Severity: Critical

**Issue:** No option for user to save credit card for future use **Recommendation:** Provide an option (e.g., checkbox) to save payment information Severity: Serious

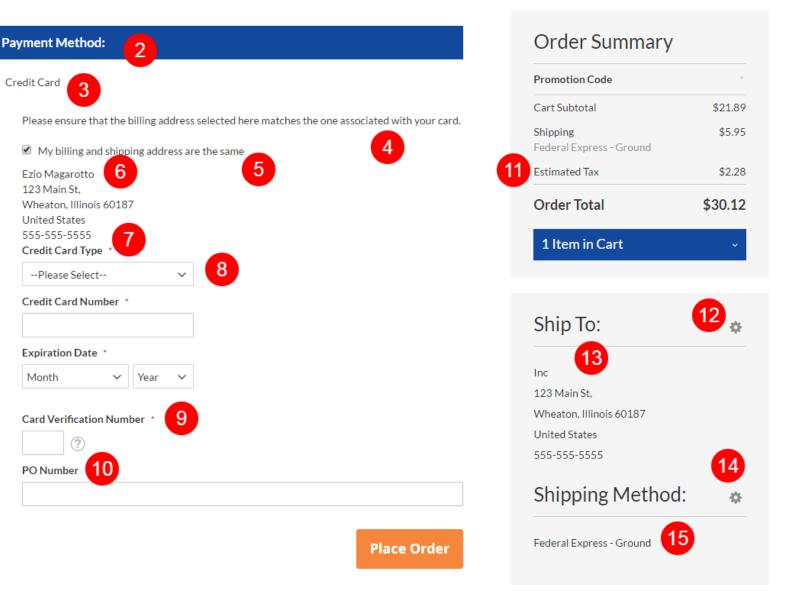
Issue: System does not auto format credit card numbers (e.g., hyphens not stripped on entry) thus throwing an error **Recommendation:** System should strip out and format credit card number entry Severity: Serious

- **Issue:** Non optimal or standard copy choice 9. Recommendation: Change to read "CVV Code" Severity: Medium
- **10. Issue:** Is this field leveraged by the majority of users? If not, it forces users to 1) Think about and 2) Wonder if they should have one Recommendation: Change to be a text link such as "Add a PO#", that surfaces the field when selected by the user Severity: Serious
- **11. Issue:** Estimated tax on review page makes user wonder what they'll actually be charged versus trusting that Performance Health correctly knows Recommendation: Change to read "Tax" only Severity: Serious
- 12. Issue: Location, size, and function of icon is neither ideal nor clear Recommendation: Simply update to read "Edit" Severity: Serious



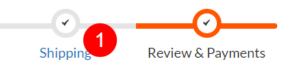
Credit Card

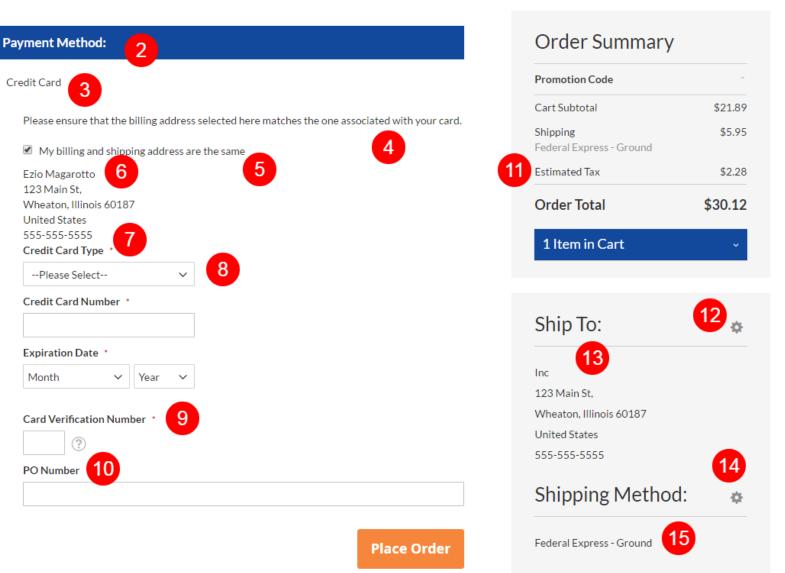
Month



#### CHECKOUT - NEW CUSTOMER (Step 4) (Cont.)

- 13. Issue: Font treatment and layout is non optimal; unnecessary content surfaced
   Recommendation: Increase font size and contrast, tighten spacing, and remove phone number
   Severity: Med
- 14. Issue: Location, size, and function of icon is neither ideal nor clear
   Recommendation: Simply update to read "Edit"
   Severity: Serious
- 15. Issue: This content is redundant and forces user to read and compare with what is already listed in the order summary Recommendation: Remove label and value Severity: Med

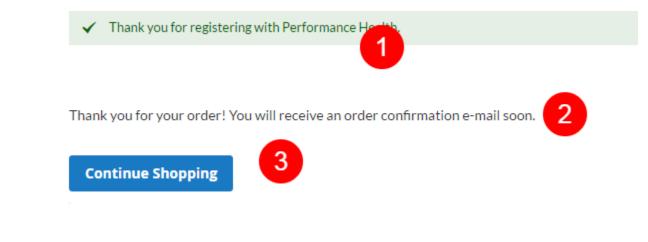




#### CHECKOUT – NEW CUSTOMER (Step 5)

- Issue: Thanking the user for doing something they had no choice in has the potential to simply remind them of earlier frustration Recommendation: Simply state they are registered and list the benefits of such Severity: Med
- Issue: No order details (products, costs, ship address, etc.) provided to user leaving them to wonder if everything is correct
   Recommendation: Provide order details to user; leverage this area for promotions, review requests, customer's like you bought..., etc.
   Severity: Med
- **3. Issue:** No option to view my newly created account or recent order

**Recommendation:** Provide an avenue for the user to access their account or order view **Severity:** Med



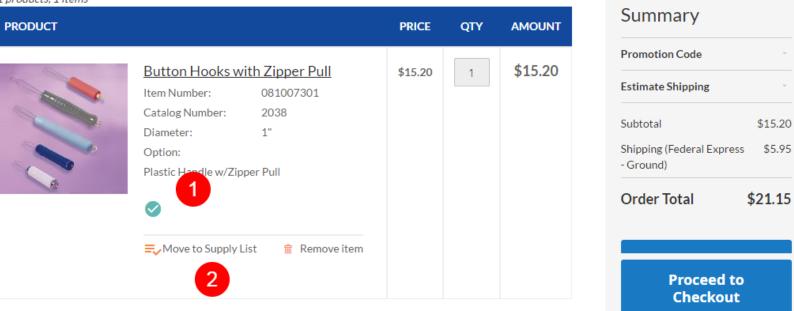
#### **CART – REGISTERED CUSTOMER**

See CART – NEW / LOGGED OUT CUSTOMER Slide 2 & Slide 3 for general issues

- 1. Issue: The icon offers no indication to its meaning Recommendation: Provide a text description Severity: Serious
- Issue: Inconsistent terminology causes user confusion are erodes trust in organization Recommendation: Leverage the exact terminology used on the product detail page Severity: Serious

## **Shopping Cart**

#### 1 products, 1 items



Update Shopping Cart

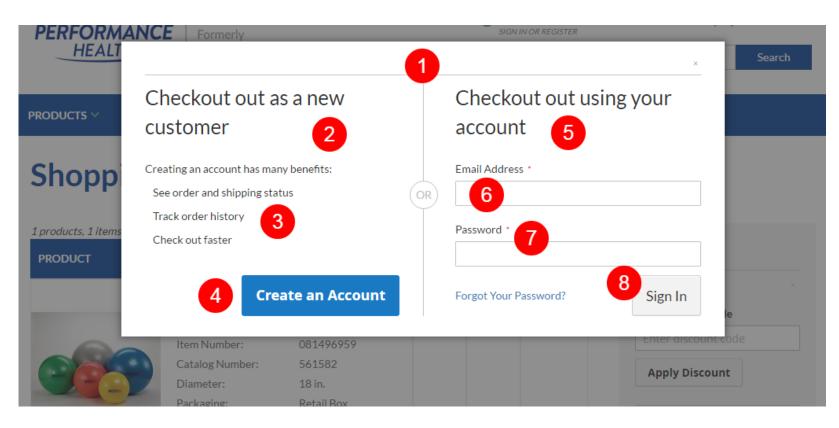
#### CHECKOUT - NEW / LOGGED OUT CUSTOMER (Step 1)

This is a repeat of **CHECKOUT – NEW CUSTOMER** (<u>Step 1</u>) but placed here to simply illustrate user flow

 Issue: Forcing users to create an account is the #1 cause for loss of conversion and a way to alienate users Recommendation: Allow guest checkout Severity: Critical

**Issue:** Unexpected results after selecting checkout button **Recommendation:** Place users in the checkout flow immediately; suggest account creation post order **Severity:** Critical

- Issue: Not allowing user to enter data on this page to move forward; removing user from checkout flow Recommendation: Surface the minimum requirements (i.e., email/password) within this modal Severity: Critical
- 3. Issue: Unnecessary information that is business not user centric. User was expecting to buy a product and not asking for account creation benefits Recommendation: Remove Severity: Serious
- 4. Issue: Unexpected, unclear, and unrequested CTA Recommendation: Remove Severity: Critical
- 5. Issue: Excessive and unnecessary copy Recommendation: Update copy to read "Sign in to checkout" Severity: Serious
- 6. Issue: Unnecessary copy Recommendation: Update copy to read "Email" Severity: Serious
- Issue: Unclear usage of red asterisks Recommendation: Change to read "Required" or offer clarity to user Severity: Serious
- 8. Issue: Inconsistent CTA and button pattern Recommendation: Arrive at a button pattern that is consistent Severity: Serious

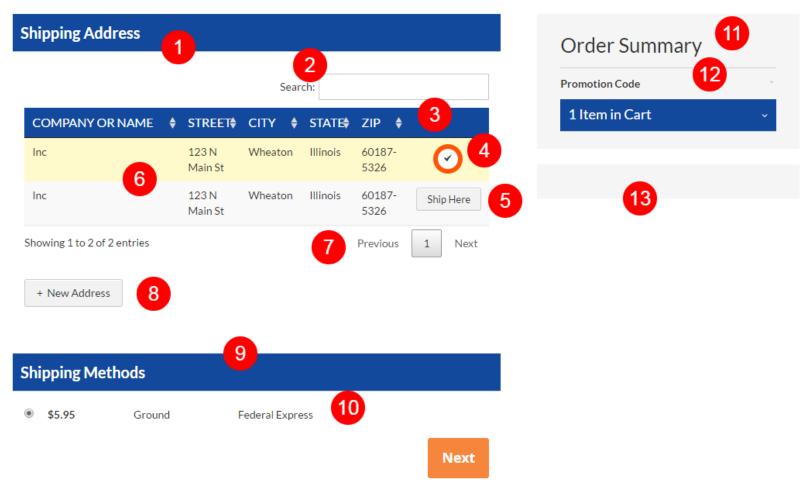


#### CHECKOUT - REGISTERED CUSTOMER (Step 2)

See CHECKOUT – NEW CUSTOMER (<u>Step 3</u>) for general issues

- Issue: The bar's visual hierarchy is poor Recommendation: Reduce saturation or modify visuals entirely Severity: Serious
- Issue: Secondary search field on page which provides no direction to user around it's purpose Recommendation: Provide a label or copy which details the function Severity: Serious
- Issue: Site appears broken, resulting in poor use and erosion of user trust
   Recommendation: Improve spacing and/or improve sorting functionality
   Severity: Serious
- Issue: Color used is typical for error or alert. Icon meaning is unclear and confusing Recommendation: Is this mean selected? If so, use typical indication for selected such as radio button or simply text Severity: Serious
- 5. Issue: Selecting Ship Here button does not appear to do anything; usage is unclear as is the redundant line **Recommendation:** Update with normal UX pattern for address selection **Severity:** Critical
- Issue: Entire shipping module is confusing and far removed from the mental model users see on other eCommerce Web sites
   Recommendation: Leverage a standard UX pattern for the shipping module section
   Severity: Serious
- 7. Issue: Displaying pagination when there is no need forces user to think why it is there, if something is broken, what occurs when I select previous or next Recommendation: Only display pagination elements when there are pages to be accessed Severity: Med

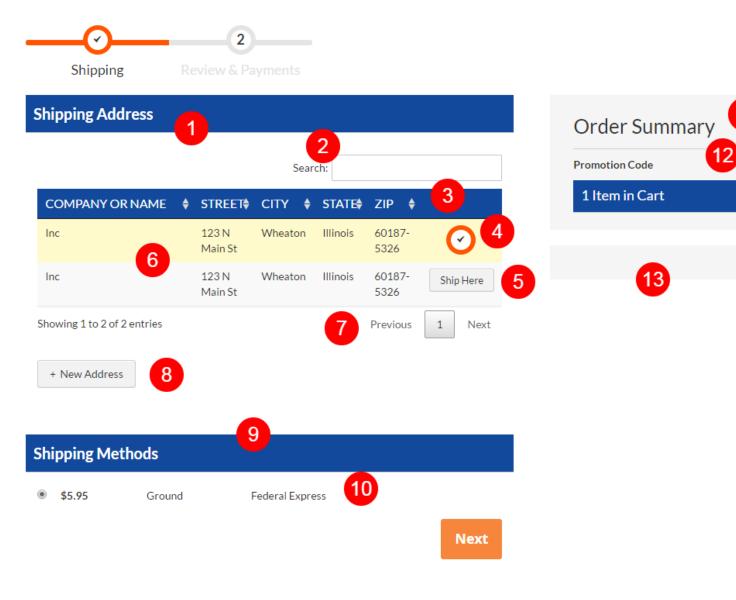




#### CHECKOUT - REGISTERED CUSTOMER (Step 2)

See CHECKOUT – NEW CUSTOMER (Step 3) for general issues

- 8. Issue: Location of add address button is not grouped near the address selection module and may be overlooked **Recommendation:** Improve placement of this option as part of creating a proper UX pattern for the shipping address module **Severity:** Med
- Issue: The bar's visual hierarchy is poor Recommendation: Reduce saturation or modify visuals entirely Severity: Serious
- 10. Issue: Entire module has no functional use to the user; Serious chance for confusion
   Recommendation: If the user has no options, do not use form elements. Make read only; update visual treatment
   Severity: Serious
- 11. Issue: Module appears broken, as there is no summary displayed. Also cart page has "Summary" and here it says "Order Summary" causing confusion
   Recommendation: Surface order summary items or a clear CTA for a user to access it. Be consistent with copy Severity: Serious
- 12. Issue: Promotion code interaction is not clear; looks like a label for "1 Item in Cart"
   Recommendation: Improve the layout, structure, and visual elements
   Severity: Serious
- 13. Issue: Empty boxes make site look broken and erode user trust
   Recommendation: Remove Severity: Med

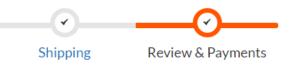


#### CHECKOUT – REGISTERED CUSTOMER (Step 3)

See CHECKOUT – NEW CUSTOMER (<u>Step 4</u>) for general issues

1. Issue: Credit card was saved without user consent; no way to remove/edit credit card

**Recommendation:** Only save credit card if user agrees to the option (must first provide option); allow add new credit card functionality **Severity:** Critical



| rment Method:   | Order Summary   |
|---|---|
| edit Card   | Promotion Code  |
| Please ensure that the billing address selected here matches the one associated with your card. | Cart Subtotal<br>Shipping<br>Federal Express - Ground                 |
| Ezio Magarotto<br>123 N Main St<br>Wheaton, Illinois 60187-5326                                 | Estimated Tax<br>Order Total  |
| United States<br>555-555-5555   | 1 Item in Cart  |
| Select From Saved Card     1       XXXX-1111, Ezio Magarotto     ~                              |   |
| Card Verification Number *  | Ship To:  |
| PO Number Place Order   | Inc<br>123 N Main St<br>Wheaton, Illinois 60187-5320<br>United States |

Shipping Method:

\$15.20 \$5.95

\$1.73

\$

\$22.88

Federal Express - Ground

#### CHECKOUT – REGISTERED CUSTOMER (Step 4)

1. **Issue:** No order details (products, costs, ship address, etc.) provided to user leaving them to wonder if everything is correct

**Recommendation:** Provide order details to user; leverage this area for promotions, review requests, customer's like you bought..., etc. Severity: Med Thank you for your order! You will receive an order confirmation e-mail soon.



## **GENERAL SITEWIDE ISSUES (PRIMARY)**

1. Visual & Structure architecture (grouping, layout, color palate, etc.)

2. Inconsistent UX/UI patterns (form elements, headers, links, etc.)

3. Inconsistent font treatment (size, weight, & color)

4. Poor form design (labeling, structure, & width)

5. Poor form validation (handling & language)

6. Inconsistent and/or improper voice (passive & active)

7. Page elements move around on pages

8. ADA Web Accessibility concerns