



NEILPATEL

Heuristic Analysis Checklist

Conversion Rate Strategies For
Doubling Your Leads & Sales

Heuristic Analysis Frameworks

Heuristic analysis is expert based analysis that uses experience-based techniques for learning, discovery, and problem solving. The results are not guaranteed to be optimal.

Everything that is discovered when analyzing an ecommerce site should be backed up with data. We are all humans with biases, but we shouldn't fall into the trap thinking our judgement is the truth.

Heuristic analysis is one of the first things to do, it helps familiarize with the site and problem areas. This way we will see if data validates or disproves findings. What you can find in heuristic analysis will help determine if more data needs to be collected on x or y subject regarding an ecommerce business and site.

Biases to be aware of:

Bias blind spot. This is the tendency to see if one is less biased than other people.

Confirmation bias. This is a tendency of people to favor information that confirms their beliefs.

For heuristic analysis it serves as an input to a hypothesis. Data needs to be looked at to confirm.

When an ecommerce site is analyzed, the worst possible way to go about things is by saying "I think this is bad, and this needs to change." Such unstructured approach serves less value because a person won't be sure what to look for. Data needs to be there to back up a claim.

"If you can't describe what you are doing as a process, you don't know what you're doing."

W. Edwards Deming, US business advisor & author (1900 - 1993)

Evaluating an ecommerce site is a process. There are some established frameworks to follow such as:

1. **Relevance.** Does my perception fit to my expectations?
2. **Trust.** Can I trust this provider?
3. **Orientation.** Where should I click? What do I have to do?
4. **Stimulance** Why should I do it right here and right now?
5. **Security.** Is it secure here? What if...?
6. **Convenience.** How complicated will it be?
7. **Confirmation.** Did I do the right thing?

A conversion framework to follow:

1. Build buyer personas and focus on a few select personas when designing your layout, writing copy and so on.
2. Build user confidence, make them trust you by using all kinds of trust elements.
3. Engagement. Entice visitors to spend a longer time, come back to visit, bookmark it, and/or refer others to it.
4. Understand the impact of buying stages. Not everybody will buy something on their first visit, so build appropriate sales funnels and capture leads instead, and sell them later.
5. Deal with fears, uncertainties, and doubts, Address users concerns, hesitations, doubts.
6. Cahn their concerns. Incentives are a great way to counter FUDs and relieve friction.
7. Test, Test, Test.
8. Implement in an iterative manner. Build smaller blocks, make smaller changes, and test them and improve their performance.

Here are steps for performing heuristic analysis for a site:

Start by conducting thorough walkthroughs of said ecommerce site with all relevant browsers and all devices available and relevant in 2021 and beyond.(Desktop, mobile, tablet). This way you'll find issues that are cross-browser and cross-device. These issues can be UX or technical issues.

When evaluating a site you can:

Assess pages for clarity. Is it clear what's being offered to the customer? Is it clear how it works? This applies to all pages, not just the product pages.

Understanding context and page relevancy for customers and visitors. Is the page related to what the visitor thought they would see? Does the pre-click and post click visuals align with expectancy?

Incentives to take action. Is it clear what visitors are getting for their money? Is there urgency that is believable? Motivators, what kinds are used? Is there sufficient product information? Sales copy, is it persuasive?

Evaluate sources of friction on pages that are key to the ecommerce business. This includes processes such as buying and completing an order, and simple processes such as signing up for a newsletter. Poor readability and UX. Any source of friction or error should be analyzed.

Are there **distracting elements** on key pages? Are there banners that are flashing and could be distracting to the visitor? Is there too much information that is not needed, does it distract from the CTA? Any action or element that is not required for the visitor to take an action should be put to question.

Understand the **buying phases** and see if shoppers are rushed into a buying commitment too soon.

When you go through all these steps, write all of it down. **This is called mapping out "areas of interest".**

So once this is written down, keep in mind that these observations might all be personal bias. If something is not good, it doesn't mean that is actually the truth. That's why it needs to be checked in the analytics. **Data is required to back these problems up.**

Besides keeping bias in mind, each problem that was written down should also be ranked from **high to low priority**. After all the site is leaking money, and the biggest leaks should be fixed first.

You can rank them based on different filters such as:

Not a usability problem at all, cosmetic problem, a minor usability problem, a major usability problem, or a catastrophe.

Now that everything is ranked, you have to find data. If there is no data, you'll have to create data. If there is too little data, it's best to move forward with the issues that do indeed have enough data.