Tip sheet: Developing a User Experience (UX) Measurement Plan

Measuring and improving the user experience of your product or service requires a plan and an understanding of who your users are. Whether your goal is to introduce guidance and processes for measuring user experience, or trying to scale UX in your organization, a well-devised plan will improve your chances of success. In addition, it can play a critical role in convincing stakeholders to invest in UX and make it an essential part of your product development process.

"_Part of the challenge with quantifying the value of UX research lies in the communication- or the lack thereof- between teams that conducts the research and the team that creates the product._" (Sauro, 2016)

Key areas to consider when creating a UX measurement plan.

Create a Communication Process

Schedule regular meetings with leadership across all teams involved in a product's development to align the team around the outcomes of the measurements. Additionally the UX research lead or manager and the product manager team should meet regularly to discuss goals and outcomes for research projects as they relate to the overall business goals.

These regular meetings will have the following impact:

- Allow an ongoing tracking and benchmarking of UX activities
- Improve communication between research and product teams to keep them focused on the business goals
- Foster a human-centered culture

UX Key Performance Indicators (KPIs)

When working with KPIs, it's best to learn how each team within the organization measures success. Once you identify the KPIs you can associate UX measures to them. The following table provides some UX KPIs examples to help you get started.

Typical KPIs	Quantitative UX KPIs	Qualitative UX KPIs
• **Actual Behavior from Live Sites (Analytics)** • **Sales & Marketing** • **Financial Metrics** • **Customer Support Metrics**	• Task success rate • Time on task • Use of search vs. navigation • User error rate • System Usability Scale (SUS)	• Reported expectations and performance • Overall satisfaction

Benchmarking Results

Benchmarking provides key metrics to track and measure product performance, and is an integral part of the overall UX process. The steps for implementing this phase of UX measurement are as follows:

- Establish who on the team is responsible for tracking and communicating results
- Determine frequency of measurement
- Once you establish a timeline, track results over time making sure to note what UX research was conducted and what product changes were introduced between measuring each metrics.
- Incorporate sample user videos or insights before and after changes have been made to demonstrate the improvements

Once you have set up the process of benchmarking and tracking goals with your research, you can begin calculating your team's ROI.

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Continuous Improvement

Using the Agile principle of continuous improvement, along with the demonstrated value of user research, will help improve your organization's UX maturity by infusing user research into your regular development cycles.

Each team's measurement plan may not be the same; the goals of this tip sheet is to get you started or evaluate your current plan. Developing and improving your measurement plan will help you stay focused on improvement while promoting the value of user research at the same time.

UX Measurement Plan Summary

Identify What KPIs are Needed	Understand how your program measures success to determine what KPIs metrics are needed. For example, Cost Savings, Burden Reduction, lower help desk support, etc.
Benchmark UX Quality Perceptions & Determine if you can Collect the KPIs	Once you have identified the KPIs you will want to be sure you have access or can collect these benchmarks along with some measure of the perception of the quality of User experience. Some examples of how you can measure UX quality perceptions include System Usability Scale (SUS), SUPR-Q (Standardized User Experience Percentile Rank Questionnaire) and Technology Acceptance Model (TAM).
Associate UX Measures with the Identified KPIs	Associate the UX measures to the KPI's you have selected. For example, task completion rate with lower help desk support. More Information: Main UX KPIs & Usability Metrics
Track and Analyze Top Tasks	Track the top tasks: conduct a top task analysis to understand what tasks/functions are essential to your customers.
Benchmark the User Experience	Once you know the top tasks you will want to benchmark the user experience of the product and product functions that address the users' top tasks. The following checklist can help get you started.
Create an Improvement Plan	Now that you have an idea where things are in the user experience you will need an improvement plan. This is where traditional UX methods can come into play.
Evaluate how the designs improved the KPIs	Understand how the changes in designs improved the KPIs. You will want to compare these KPIs over time and see what is having an impact and where you need to make changes. More Information: Statistical tests and Calculators.
Calculate the ROI	Now that you have made the changes to show how they have improved the user experience and KPIs, you can use the linkage to compute the return on the investment. This is how you can demonstrate the impacts of your design changes.

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Conduct UX Audits	Conduct periodic UX Audits to ensure that your team incorporates any changes made during the development process and ensure the right methods and metrics are being collected. More Information: UX Audit Guide & 10 Usability Heuristics

Source: Jeff Sauro

Books

- Benchmarking the User Experience
- A Practical Guide To Measuring Usability
- Quantifying The User Experience: Practical Statistics For User Research
- Whitepaper: Proving the ROI of UX Research (UserTesting)

Sources:

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