

ZURB

# Make Confident Decisions on Every Iteration

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## Introduction to the Method

Traditional usability tests are slow and require you to interpret qualitative feedback. Collecting feedback from participants is cumbersome, and synthesizing your notes into insights and actions can be daunting. Sharing this information with your team is difficult because you have to decode how users perform tasks.

But it doesn't have to be that way. This is where the Interaction Matrix can kick this work into warp speed.

### What is the Interaction Matrix?

The Interaction Matrix is a powerful and intuitive tool for understanding the actions of your audience on a web page. You can swiftly evaluate hundreds of participants using qualitative and quantitative data. Learning this method to help make UI design improvements is well worth the time spent, for both designers and product managers alike.

You'll understand how audiences interact with each iteration of your screen design. This allows you to pinpoint areas of improvement to make your designs more usable and compelling.

The Interaction Matrix is a vehicle for documenting feedback and taking action in 3 distinct parts:

- Directives inform the usability of specific actions in your user interface.
- Participants' success in completing directives informs areas of improvement in the design.
- Actionable recommendations surface alongside each directive to drive the next iteration or round in a confident way.

Why is this important? Engaging your users and getting them to take action can be difficult. And without clear evidence of user engagement, it's hard to convince your team that a design is effective. The Interaction Matrix helps you examine your interactions with others so you can understand what is going on through documentation.

The Interaction Matrix brings clarity into user experience design so there are no more guessing games when designing interfaces. Instead, we showcase concrete evidence about which parts might work better than others based on our own data.

		Build an Audience			
		PRIMARY ACTION	SECONDARY ACTION	TERTIARY ACTION	TERTIARY ACTION
		Create a New Audience	Add an Attribute	Save the Audience	Select an Existing Audience
SCREENS	Hi-fi R1 (DESKTOP)	85%	78%	90%	75%
	Hi-fi R2 (DESKTOP)	83%	90%	86%	72%
	Visuals (DESKTOP)	79%	87%	81%	73%
	Mobile	87%	N/A	N/A	90%
RECOMMENDATIONS		<b>1. Keep this CTA consistent and the prominent one on this screen.</b>	<b>2. We want this element to stay as consistent as possible through future iterations.</b>	<b>3. Consider minimizing the amount of CTA buttons.</b>	<b>4. Keep this CTA and hierarchy</b>
		We've seen this directive improve in the scoring with this iteration, which is a strong indicator that we're delivering good usability with the specific interaction.	This directive is scoring very high with the first iteration, which is a strong indicator that we're already delivering good usability with the specific interaction.	There are a lot of CTAs on this page, which is diluting where the user's are gravitating towards.	We've seen this CTA improve, so keep this hierarchy of the menu consistent.

More importantly, the Matrix is sharable and easily digestible. This allows your entire team to get on the same page and decide on the best course of action.

<https://docs.google.com/spreadsheets/d/1liDKmTcQr16dN-L0FOu0YIkkrd5c6LFVXtOF0JYe9bs/edit?usp=sharing>

## Interaction Matrix Properties

An interaction matrix is built of multiple components:

- Audience
- Key experience areas
- Directives & actions
- Screens
- Success percentages
- Recommendations

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	Mobile	87%	N/A	N/A	90%
RECOMMENDATIONS		1. Keep this CTA consistent and the prominent one on this screen.	2. We want this element to stay as consistent as possible through future iterations.	3. Consider minimizing the amount of CTA buttons.	4. Keep this CTA and hierarchy
		We've seen this directive improve in the scoring with this iteration, which is a strong indicator that we're delivering good usability with the specific interaction.	This directive is scoring very high with the first iteration, which is a strong indicator that we're already delivering good usability with the specific interaction.	There are a lot of CTAs on this page, which is diluting where the user's are gravitating towards.	We've seen this CTA improve, so keep this hierarchy of the menu consistent.

## Audience

Your audience is the first component that needs to be defined. When it comes to understanding people, you can't get a more insightful perspective than the one from your target audience.

If you want your feedback system to be effective and provide compelling insights, you'll need clarity on your target audience. Who are they exactly? Considering your audience whether a group or individual must be paramount. [Helio](#) makes this easy by providing audiences.

## Key Experience Areas

The first step of measuring the current state of your app or website is to identify the primary actions you want participants to take. This will help you outline your definition of success!

Analyzing what you determine is a successful pathway across iterations can help you evaluate if your decisions are improving your audience's ability to comprehend and use your platform.

An experience area can be a website page, a mobile app screen, or a single component of a site.

## Actions & Directives

The directives you give your audience are the most important aspects of the testing. On your platform, what are the primary, secondary, and tertiary actions you want participants to take? **The Interaction Matrix measures where the user will click and which pathways they will navigate on your platform.**

Determining where you want your user to click would contribute to what we have identified as the success rate. For example, your site has "Shop Now", "Pre-Order Now", and "Sign in to Save". You could consider all of these successful if your goal is having users browse product options.

However, if we direct a user to click where they would sign in to view promotional discounts, there is a clear primary call-to-action. You can use the Interaction Matrix to concisely measure how these calls to action are understood through testing in multiples, iterations, and against different CTAs.

## Screens

Improving the experience and usability of a design requires iteration. You'll need screens to test, either as screenshots of a live page, or assets created in tools like Figma or Sketch. We use Figma for our screen production at Helio.

Screen iterations could include:

- Versions of a screen (desktop, tablet, mobile web, or mobile app)
- Fidelity of a screen (sketch, wireframe, production page)
- Iteration of a screen (version 1, version 2, version 3)

Testing different screen types, like desktop and mobile, is a great way to identify problems that arise from screen format changes. In a creative process, we often start with lower fidelity ideas and move on to higher fidelity screens in tools like Figma. The Interaction Matrix is a great way to learn as you develop concepts.

Lastly, keeping track of iterations can help you see if there's improvement in your work.

## Success Percentages

You'll need a way to collect feedback from the audience to determine the success of each directive.

Helio is an amazing choice to collect participant feedback. There's no right number for testing, though you'll need to get enough feedback in each bucket to get large enough signals. Traditional heuristic evaluations use feedback from 5 to 10 participants, while Helio enables the collection of feedback from a much larger sample. . The examples included here had 100 participants.

Each directive is scored based on completion of the action. If 80 out of 100 people were able to successfully complete the action, the block is given 80%. If we're evaluating a primary action, this is an average usability score.

Success Key			
RATING	PRIMARY ACTION	SECONDARY ACTION	TERTIARY ACTION
NEEDS IMPROVEMENT	Less than 80%	Less than 75%	Less than 55%
AVERAGE	80 - 90%	75 - 85%	55 - 65%
EASY TO USE	Above 90%	Above 85%	Above 65%

## Recommendations

Each action column of the chart requires recommendations based on the latest iteration.

There should be a directive, something like: “1. Keep this CTA consistent and the prominent one on this screen,” followed by an observation: “We've seen this directive improve in the scoring with this iteration, which is a strong indicator that we're delivering good usability with the specific interaction.”

These can be hidden for each row as you iterate, or written over as the iterations improve. are advocate experts draw on their knowledge of the data to create recs. Your team will need to draw on their knowledge to craft insights from your data.

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## Setting up the Interaction Matrix

Here is a checklist of items you'll need when creating your own Interaction Matrix:

1. Have your audience identified and ready to go
2. Choose screens that need improvement
3. Define directives that gauge the success of your design
4. Use testing software to review the success of each directive

You can test the reaction to your designs and whether your target audience comprehends them in a variety of ways. We recommend getting a high volume of participants for each round through our software [Helio](#). For the sake of keeping the concepts concrete, we'll use Helio to set up a test.

## Setting up an Audience

Helio makes it incredibly easy to test with an audience. Test with a group of your own participants, or use our community of over 500,000 participants. If you need a specific group targeted by behaviors or responsibilities, reach out to our team to learn about Advanced Audiences!

## Design Areas

What should you test? Test areas where users need to accomplish tasks. Things like searching, finding products, browsing items, or making a purchase. You can test a currently live page that isn't producing the engagement you want. Or test a new iteration that needs a usability check.

Once you have your screens decided on, outline the primary, secondary, and tertiary actions on each screen. A primary CTA represents your top priority action on the page, while secondary CTAs are slightly less integral, and tertiary actions are extra options that may not drive the business. The priority of a CTA is often (but not always!) defined by its size on the page.

## Define Directives

With this type of test, you'll frame your questions as directives. Instead of thinking about user needs in a generative way, we're evaluating their actions to determine if they can complete tasks. Make sure there is a clear directive for each primary, secondary and tertiary action, so you'll know if it's successful or not.

Poor Example: "Click on an interesting part of the screen." This directive does not have a clear way to determine success. It does not provide a reference.

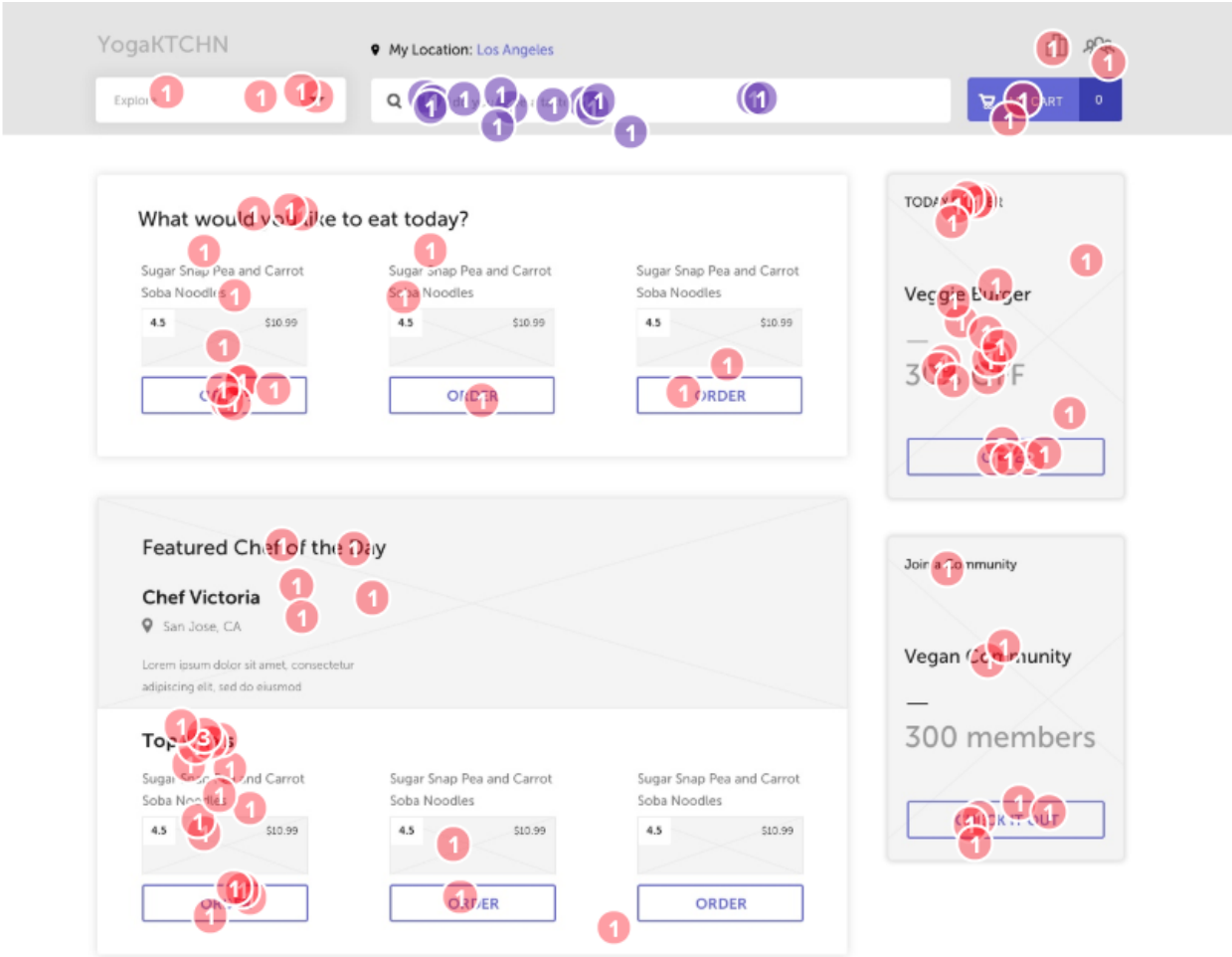
Better Example: "Click where you would start a search to find a new restaurant." The success of this directive can be quantified by calculating the total number of participants that clicked in a defined area.

## Use Testing Software

The questions you ask and the directives you formulate are key to each test. Helio provides a simple and effective way to set this up.

The [Click Test](#) is the primary question type used in the Interaction Matrix. When combined with a follow-up question, you'll see where a user clicks on first exposure to a screen, their response time, and written explanations for their decisions.

The image below lays out how responses are visualized in [Helio](#). You can see where users actions are clustered on a page. The best part: you can watch the responses in real-time.



Helio makes collecting click data extremely easy. After each test is completed, click areas are outlined on the screen. The data is then calculated instantly for any portion of the screen. If an action can be completed in different parts of the screen, you can select multiple areas.



# Interaction matrix template

The template includes blank fields to start including feedback. For each new experience area, component or page, you can copy this block:

<https://docs.google.com/spreadsheets/d/1qKM9qzgm6og8puexUOorsIK42RipjDEev-aaodGXtY4/edit?usp=sharing>

This blank interaction matrix includes these properties:

- Audience
- Key experience areas
- Actions & Directives
- Screens
- Success percentages
- Recommendations

		Area Title			
		PRIMARY ACTION	SECONDARY ACTION	TERTIARY ACTION	TERTIARY ACTION
		Insert a Directive	Insert a Directive	Insert a Directive	Insert a Directive
SCREENS	ITERATION 1	85%	78%	90%	75%
	ITERATION 2				
	ITERATION 3				
	ITERATION 4				
RECOMMENDATIONS		1. Change a piece of the UI	2. Change a piece of the UI	3. Change a piece of the UI	4. Change a piece of the UI
		This is a short summary of why the change might improve the overall design.	This is a short summary of why the change might improve the overall design.	This is a short summary of why the change might improve the overall design.	This is a short summary of why the change might improve the overall design.

# Interpreting test results

The success of participant actions helps everyone on the team see where things are working or falling short on a screen. However, what happens when participants aren't successful?

Are there better words that can be used for your call to action? Are there changes that need to be applied to your audience? How is your overall message being received?

There are other tools built into the Helio report to give you a better understanding of why problems might exist.

- Follow-up questions
- Sentiment analysis
- Response time

Comparison data like this isn't actionable without qualitative responses and knowing the reasoning behind your audiences' actions. [Helio](#) gives you the ability to filter through responses and look at participants' written explanations for their actions.

**The Interaction Matrix is polished and completed with recommendations based on these qualitative responses.**

To craft these recommendations, start by highlighting clusters of clicks in the Helio report view to look into participants' written responses for each of their actions. These insights, along with your knowledge of your business's customers, will drive the changes that you want to make on each page.

For Helio on Demand customers, if you'd like to tap into our team for help, our Advocates can synthesize data that scales across multiple variations of designs and audiences. ( and they'll teach your team to do the same!). We'll capture direct comparisons of how each audience reacts to variations of a design, and package it all into the framework you see above.

The Interaction Matrix is a visual screenshot of data organized into actionable recommendations. This helps you see if your design iterations are improving and how they are received.

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# Examples of the Method

The Interaction matrix can be used across different screens, form factors, and components. Below are some examples to show the versatility of this method.

### [Business to business example](#)

This example represents a complex business application for creating ads campaigns on an advertising platform. Each screen showcases different functions on the platform.

### [Consumer app example](#)

This example represents a consumer mobile banking app. Each screen showcases different functions on the platform.

### [Ecommerce example](#)

This example represents a men’s online clothing retailer

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# Selling the results to your team

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RATING	PRIMARY ACTION	SECONDARY ACTION	TERTIARY ACTION
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