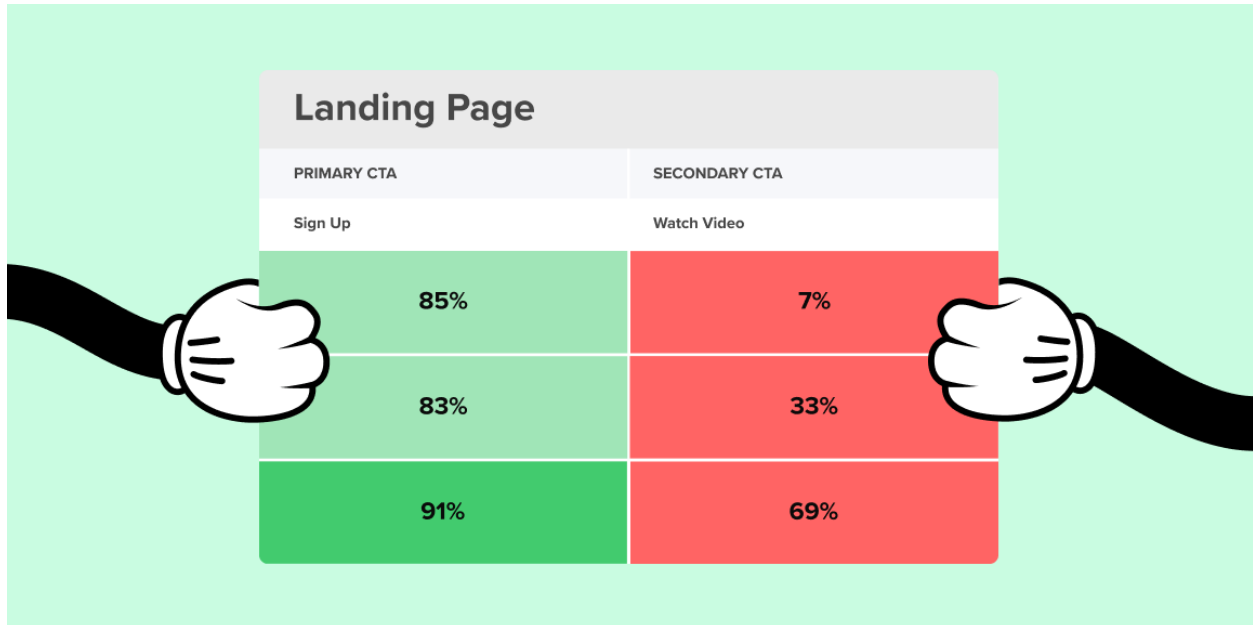


Interaction Matrix

NOVEMBER 2021 (Updated April 11th, 2023)



[Introduction to the Method](#)

[Interaction Matrix Properties](#)

[Setting up the Interaction Matrix](#)

[Interaction matrix template](#)

[Interpreting test results](#)

[Examples of the Method](#)

[Selling the results to your team](#)

Introduction to the Method

The image below shows a fully fleshed out Interaction Matrix, complete with 4 rounds of data and responses from over 1600 participants. Using Helio, we were able to collect that much data and work through 4 variations of a new design in a MATTER OF HOURS!

| Homepage | | | | | |
|-----------------|---|---------------------------|--|--|---------------------|
| | | PRIMARY ACTION | SECONDARY ACTION | SECONDARY ACTION | TERTIARY ACTION |
| | | Shop for a Suggested Look | Sync Your Calendar | Watch the Instructional Video | Take the Style Quiz |
| VARIATIONS | Baseline | 68% | 64% | 59% | 71% |
| | Version 1 | 79% | 82% | 79% | 85% |
| | Version 2 | 73% | 95% | 83% | 82% |
| | Version 3 | 89% | 93% | 77% | 86% |
| RECOMMENDATIONS | 1. Emphasize "Shop this Look" | | 2. Relocate calendar icon | 3. Rename "Style Guide" | N/A |
| | Provide a color that stands out from product images above | | Shoppers selected the calendar icon instead of the link. | There are several actions on the page that allude to providing style advice. | |

The Interaction Matrix is a method to track the usability of a website's design. Helio's remote surveys are used to test the usability of different actions on a web page, and the data is loaded into the Interaction Matrix to provide a big picture view of how participants interact with the designs.

The Interaction Matrix (IM) is best used to track usability of a page over several versions of a design. Gathering initial data will help you make the first tweaks, and the IM will give you a place to collect that data and track improvement (or regression) over time.

Helio can be used to gather multiple rounds of data, thousands of participant responses, for the Interaction Matrix in a matter of hours. Traditional usability tests are slow and require you to interpret long hours of recorded actions. Synthesizing your notes from these sessions can be daunting. But it doesn't have to be that way. This is where the Matrix can kick your work into warp speed.

The Interaction Matrix is a powerful and intuitive tool for understanding the usability of different actions on your platform. 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.

The best part is, this is easily shareable with your team for making quick business decisions. The simple color coded key of the Matrix gives a high level look that even people who only take a glance can see results through the framework. Simply put, green is good!

We want you to be able to utilize this method for your own designs, so we've put together an example Interaction Matrix to test the usability of an eCommerce site we call Getup. To learn how to make your own Interaction Matrix, and our tips for selling the results to your team, continue reading below!

Interaction Matrix Properties

An interaction matrix is built of multiple components:

- Audience
- Design
- Actions
- Test
- Data
- Recommendations
- Variations

| Homepage | | | | | |
|-----------------|-----------|--|---|---|---------------------|
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| RECOMMENDATIONS | | 1. Emphasize "Shop this Look" Provide a color that stands out from product images above | 2. Relocate calendar icon Shoppers selected the calendar icon instead of the link. | 3. Rename "Style Guide" There are several actions on the page that allude to providing style advice. | N/A |
| | | | | | |

Interaction Matrix filled out with 4 rounds of data on a single design.

Audience

Your audience is the group of participants you want to interact with your designs and get feedback from. Who your audience is will be the first piece that needs to be defined.

Demographics such as age, gender, and location are widely used parameters for targeting the right audience. Helio's Targeted Audiences give you the option to target by income and education as well.

The most effective method is to target your participants based on their behaviors and responsibilities. Start by identifying the unique traits that make a participant someone you need feedback from, and then reach out to our team to begin building that audience.

Cybersecurity Professionals (Global)

Participants who are responsible for the cybersecurity of their company.

| Titles | Skills | Industries | Time on the Internet | Devices |
|---|-------------------------|---|----------------------|-------------|
| 8% IT Manager | 10% Computer Skills | 26% Information Technology and Services | 79% 6 or more hours | 95% Desktop |
| 5% CIT (Chief Information Technology Officer) | 3% Database management | 15% Computer & Network Security | 17% 3- 6 hours | 37% Tablet |
| 3% IT | 3% Data Entry | 6% Computer Networking | 2% Less than 3 hours | 87% Mobile |
| 3% IT analyst | 3% Communication Skills | 5% Computer Software | | |
| 2% IT Consultant | 3% Administrative | 4% Computer Hardware | | |
| 1% Cyber security | 3% Web Development | 2% Security and Investigations | | |

Demographics

Key demographics of this audience

GENDER

Male 85.35%



| | |
|--------|--------|
| Male | 85.35% |
| Female | 14.01% |
| Other | 0.64% |

AGE

25-34 37.58%



| | |
|-------|--------|
| 25-34 | 37.58% |
| 35-44 | 35.67% |
| 45-54 | 15.92% |
| 55-64 | 5.10% |
| 18-24 | 4.46% |
| 65-74 | 0.64% |
| <18 | 0.64% |

INCOME

Less than \$40K per year 56.69%



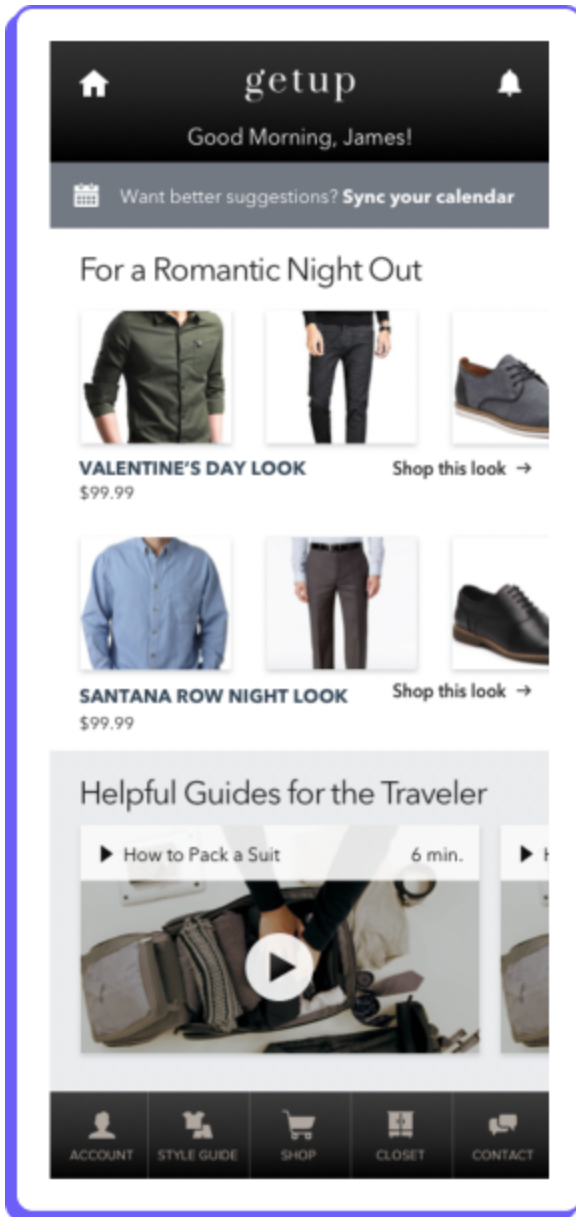
| | |
|---------------------------|--------|
| Less than \$40K per year | 56.69% |
| More than \$100K per year | 24.20% |
| \$40K to 100K per year | 19.11% |

An audience available for use in Helio. Each audience shows the demographic breakdown of its participants.

On top of completely custom groups of participants, Helio's Ready-Made Audiences provides over 1,000 pre-set groups of participants targeted by their actions and ideas. We used one of these ready-made audiences, Male Formalwear Online Shoppers in the US, to test the usability of our men's eCommerce clothing site.

Design

This may feel like an obvious step, but you need to know what area of your platform you'd like to focus on.



Homepage of the men's formalwear eCommerce site, Getup.

Actions

As we mentioned, the Interaction Matrix works best for testing designs with multiple opportunities for interaction. The specific actions that you want to test will be your Calls-to-Action in the IM, and there are three types of CTAs: primary, secondary, and tertiary. Check out our section on setting up the Interaction Matrix to learn the difference between these actions.

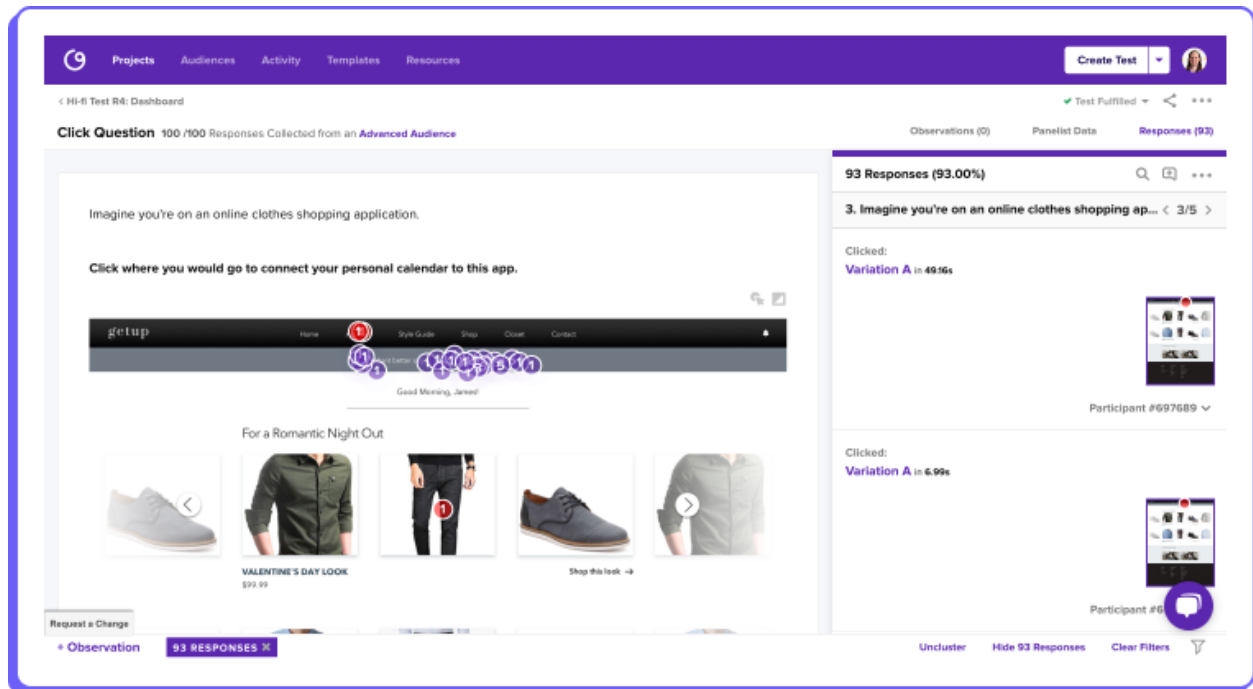
The Interaction Matrix works best when tested on a single page with a variety of CTAs for participants to interact with. This way you can keep participants in a single mindset and gauge the usability of several different actions on a page at once.

The design area for our Interaction Matrix example is the homepage of an eCommerce clothing site, with CTAs ranging from accessing your shopping cart to taking a personal style quiz.

A design can be an entire web page, or it could be a specific area of a product, feature, or content that users have multiple opportunities to interact with. Homepages or dashboards are a great place with a variety of items to interact with, and that's what we selected as our first eCommerce design for testing.

Test

The actions you've identified in your design will be turned into questions in Helio's user survey platform. To test whether participants can take action on your design, you'll use Click Test questions, which gathers first-click data from participants using your designs.



Helio data report used to collect the percentages for the Interaction Matrix.

Data

The data to populate your Interaction Matrix is pulled from your Helio test. Once you send the test to your audience, the data will appear as red clicks across your designs.

For each question, you're looking to determine the percentage of participants who successfully clicked on the correct action. Helio's data report allows you to click-and-drag a box over a collection of clicks to see how many participants clicked in that area. That percentage of participants then goes into the Interaction Matrix under the appropriate column for that action.

| Homepage | | | | |
|-----------------|---------------------------|--------------------|-------------------------------|---------------------|
| VARIATIONS | PRIMARY ACTION | SECONDARY ACTION | SECONDARY ACTION | TERTIARY ACTION |
| | Shop for a Suggested Look | Sync Your Calendar | Watch the Instructional Video | Take the Style Quiz |
| | Baseline | 68% | 64% | 59% |
| | Version 1 | | | |
| | Version 2 | | | |
| RECOMMENDATIONS | Version 3 | | | |
| | 1 | 2 | 3 | 4 |
| | | | | |
| | | | | |
| | | | | |

A single row of data entered into the Interaction Matrix.

Once the percentage is entered into the Interaction Matrix, refer to the success key to understand how well each action performed. The colors highlighting the IM data points correspond to 3 measures of success: easy to use, average, and needs improvement.

Recommendations

Once the data is entered and the success key has been used to color in the full picture, it's time to start thinking about the next version of your design. The data will show you which actions need improvement, and your recommendations should speak to how your team can produce that improvement for that action.

The format of our recommendations usually appears as a single concise suggestion, followed by an explanation of why that may improve results. For instance, the suggestion for our eCommerce site would be to emphasize the Shop this Look CTA because the color may clash with product images above.

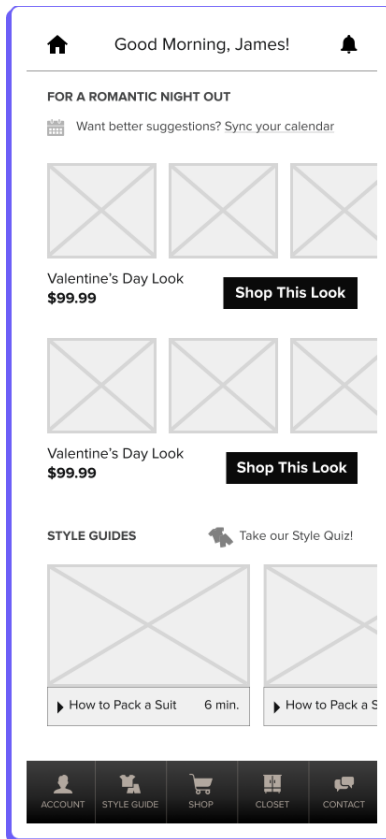
| Homepage | | | | |
|-----------------|--|---|---|---------------------|
| VARIATIONS | PRIMARY ACTION | SECONDARY ACTION | SECONDARY ACTION | TERTIARY ACTION |
| | Shop for a Suggested Look | Sync Your Calendar | Watch the Instructional Video | Take the Style Quiz |
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| RECOMMENDATIONS | Version 3 | | | |
| | 1. Emphasize "Shop this Look" Provide a color that stands out from product images above | 2. Relocate calendar icon Shoppers selected the calendar icon instead of the link. | 3. Rename "Style Guide" There are several actions on the page that allude to providing style advice. | N/A |

A round of recommendations after the first data is collected in the Interaction Matrix.

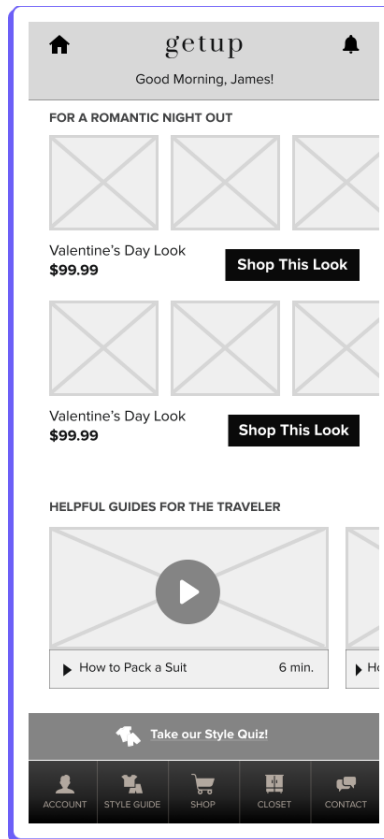
Anyone can make a recommendation on how to move forward your designs, the key is to have a test & learn approach in mind. The Interaction Matrix gives you a tool to quickly test your new designs against old iterations, so we encourage you to come up with as wide a variety of improvements as possible and put them to the test! Your teams' imagination is your only limitation.

Variations

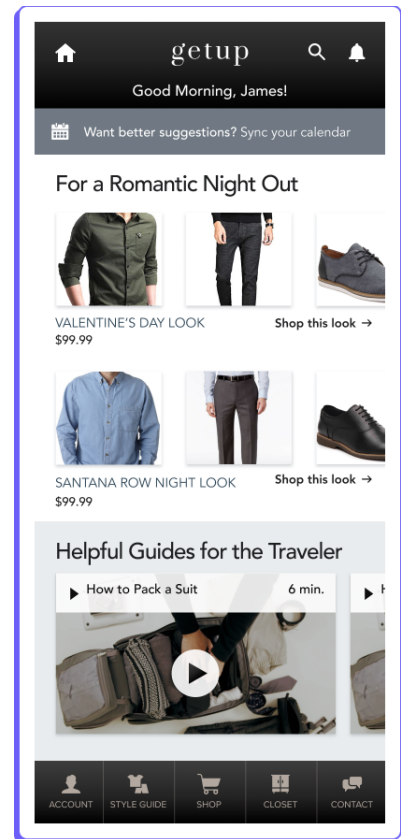
Improving the experience and usability of a design requires iteration. Once you've tested the first version of your design, be prepared to explore other variations based on what you learn from the data.



V1 – Wireframe



V2 – Lo-fidelity visuals



V3 – Hi-fidelity visuals

Variations of a design could include screen types, like desktop or mobile, creative evolutions, like moving from wireframes to full visuals, or simply taking a finished design and creating a new version.

For our eCommerce company Getup, we started our Interaction Matrix testing in the wireframe stage to determine if there were any glaring issues with the information architecture. From there we moved into brand colors and finally full visual variations. This allowed us to track and measure our designs' usability as we moved through the creative process.

The Interaction Matrix becomes most valuable when you take advantage of the speed of the testing. Helio's testing platform can get you data from hundreds of participants in a matter of hours, so you can be evaluating the data from your first round of designs in the morning and start setting up new variations for testing that afternoon.

Setting up the Interaction Matrix

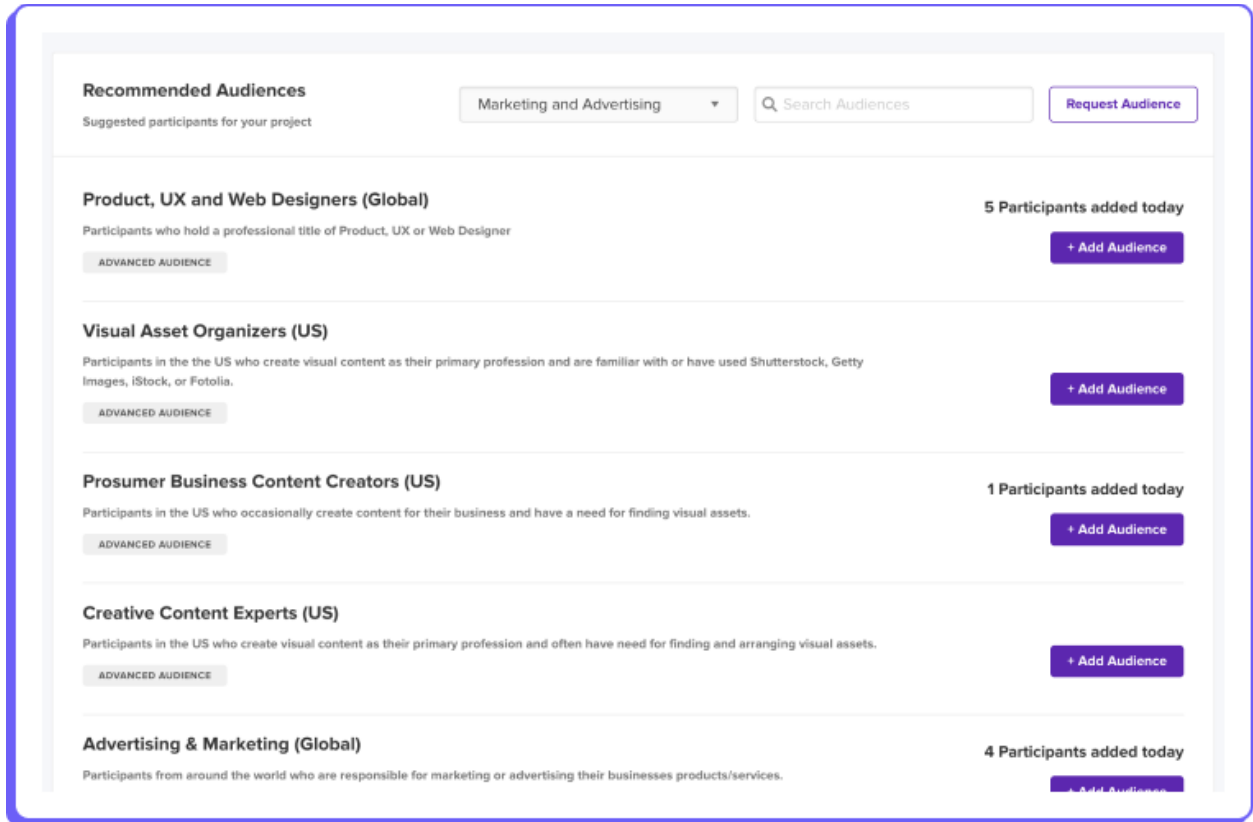
Here is a checklist to follow when creating your own Interaction Matrix:

1. Prep your audience
2. Create Interaction Matrix spreadsheet
3. Define actions to test
4. Create Helio test
5. Gather data from Helio responses
6. Load data into Interaction Matrix

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.

Prep your audience

The most important part of your testing always comes first: understanding who you're talking to. Helio makes it easy with over 1,000 ready-made audiences at your fingertips. If you can't find the group you're looking for, reach out to our team and we can create a custom audience for you!



Audience search page in Helio, which allows you to search and choose from over 1000 ready-made audiences.

Create Interaction Matrix spreadsheet

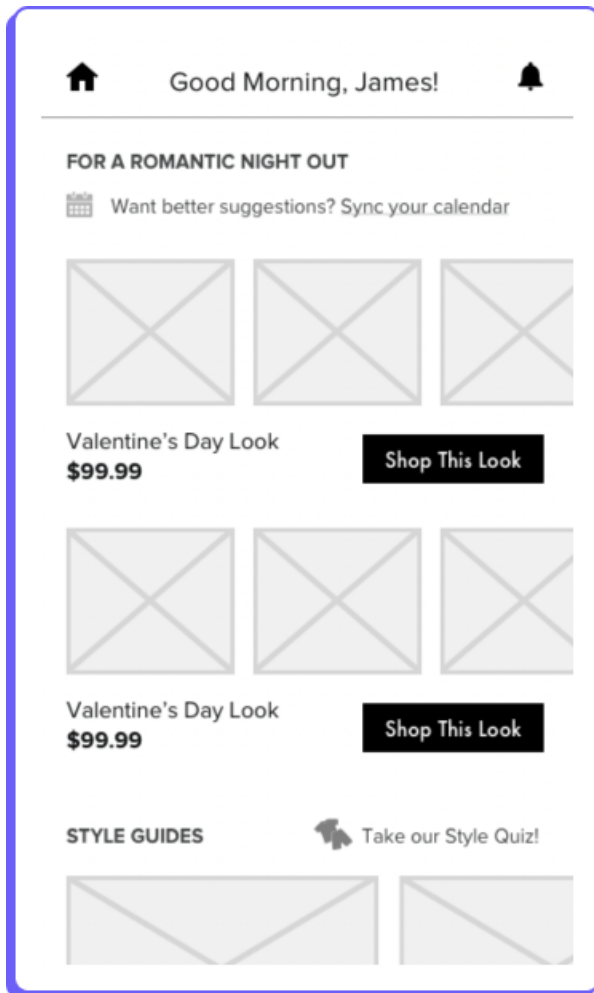
Another easy step! Using our IM template below, you can create a copy of our spreadsheet to drive your own testing. Follow the steps in the Template section below to have your own Interaction Matrix set up in minutes.

| Homepage | | | | |
|-----------------|---------------------------|--------------------|-------------------------------|---------------------|
| VARIATIONS | PRIMARY ACTION | SECONDARY ACTION | SECONDARY ACTION | TERTIARY ACTION |
| | Shop for a Suggested Look | Sync Your Calendar | Watch the Instructional Video | Take the Style Quiz |
| | Baseline | | | |
| | Version 1 | | | |
| | Version 2 | | | |
| | Version 3 | | | |
| RECOMMENDATIONS | 1 | 2 | 3 | 4 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Interaction Matrix template, ready for you to use!

Define actions to test

There are three types of actions on each page: primary, secondary, and tertiary actions. Identifying which of these 3 each of your CTAs falls into will determine how the success of these actions will be measured once the data rolls in.



The first type is a Primary CTA, which represents the most pressing action on the page. This is the 1 or 2 action(s) that your business most wants users to take in the design. For the eCommerce site Getup, we want the Shop this Look action to gain the most attention on the homepage.

Secondary CTAs are important actions on the page that you don't want to overshadow primary CTAs. This may be a contact button or sign-in action; something that needs to be easily found but not emphasized. On Getup's site, secondary actions range from syncing your calendar to clicking into an instructional video.

Tertiary CTAs are last, but not least. These are actions that need to be present on the page, possibly for accessibility or even legal reasons, though they are placed out of the way on the edges of the design. Our eCommerce formalwear site has many tertiary actions, like adjusting user settings or accessing a personal style quiz.

When deciding which of these 3 buckets your actions live, consider not only their visibility on the page, but their importance to the business. Once you've determined the CTAs you're evaluating, write them each into your IM spreadsheet in the gray row under the primary, secondary, and tertiary action labels.

| | | Homepage | | | |
|-----------------|-----------|---------------------------|--------------------|-------------------------------|---------------------|
| | | PRIMARY ACTION | SECONDARY ACTION | SECONDARY ACTION | TERTIARY ACTION |
| | | Shop for a Suggested Look | Sync Your Calendar | Watch the Instructional Video | Take the Style Quiz |
| VARIATIONS | Baseline | | | | |
| | Version 1 | | | | |
| | Version 2 | | | | |
| | Version 3 | | | | |
| RECOMMENDATIONS | | 1 | 2 | 3 | 4 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Actions loaded into the Interaction Matrix.

Now that the bones of your Interaction Matrix are set up, we can move on to creating the test that will deliver our data.

Create Helio test

The Click Test is the primary question type used in the Interaction Matrix. This question type shows you where a user clicks on first exposure to a screen, their response time, and you can ask for written explanations for their decisions.

1. Click ▾

Question

What would you like to ask?

Upload an Image

+ Add an Image

Did you know?

You can add up to three variations to create a multi-variate question. The users will randomly see one of the three variations in your test. This is a great tactic for honing in on top performing designs.

Helio Click test, the primary question type for Interaction Matrix testing.

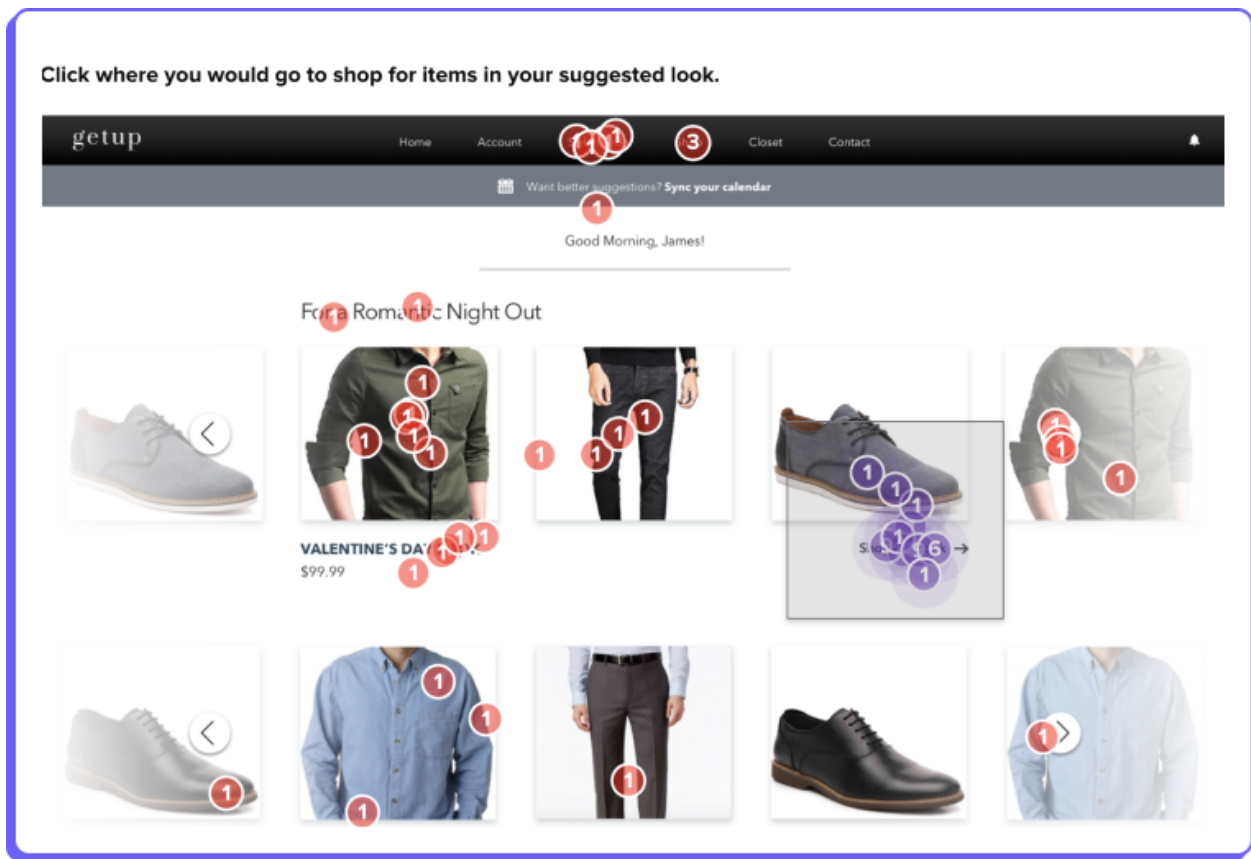
The questions in your test will come from the actions you've outlined in the previous step. That means if you want to test 4 actions on the page, you'll have at least 4 questions in your test. We also like to add in an open "click where you would go first" question at the beginning of the test for extra qualitative feedback. In the case of our eCommerce company Getup, we tested 4 actions on the homepage, so our test came out to 5 questions overall.

The key to turning an action into a question on a test, is actually not to ask a question at all. We suggest that your actions be provided as directives for participants, without a question mark at the end. For instance, "where would you go to sign up?" would be changed to "Click where you would go to sign up." This is more closely aligned to a goal that a user would have rather than giving them the chance to ponder too long on a question. Check out the Getup Interaction Matrix [test](#) to see how we worded our directives.

Gather data from Helio test

Once your responses have been collected, you'll be able to measure the success of your CTAs using Helio's data reporting tools. The data will be displayed as red clicks on your

designs, and you can click-&-drag a box over areas of the screen to find the percentage of participants who clicked in that space.



Helio data report, showing individual clicks from participants on the page.

Once you highlight an area of clicks, those red dots will turn purple and the percentage of participants in the box will appear in the upper right of the report (above the response panel).

Load data into Interaction Matrix

Take the data percentage you found in the previous step and load it under the appropriate column in your Interaction Matrix.

| Homepage | | | | |
|-----------------|---------------------------|--------------------|-------------------------------|---------------------|
| VARIATIONS | PRIMARY ACTION | SECONDARY ACTION | SECONDARY ACTION | TERTIARY ACTION |
| | Shop for a Suggested Look | Sync Your Calendar | Watch the Instructional Video | Take the Style Quiz |
| | Baseline | 68% | | |
| | Version 1 | | | |
| | Version 2 | | | |
| | Version 3 | | | |
| RECOMMENDATIONS | 1 | 2 | 3 | 4 |
| | | | | |

A single data point entered into the Interaction Matrix.

We find it easiest to have our Helio test and IM spreadsheet open side-by-side, and load in the data points one box at a time as we move through questions in the test.

Once your data points have been dropped into the spreadsheet, check out our section on Interpreting the Results to measure the success of your actions.

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

| Homepage | | | | |
|-----------------|--|---|---|---------------------|
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| | Version 3 | 89% | 93% | 77% |
| RECOMMENDATIONS | 1. Emphasize "Shop this Look" Provide a color that stands out from product images above | 2. Relocate calendar icon Shoppers selected the calendar icon instead of the link. | 3. Rename "Style Guide" There are several actions on the page that allude to providing style advice. | N/A |

Interpreting test results

Now that your data points have been loaded into the Interaction Matrix, it's time to get colorful. Each type of CTA has different success percentages based on whether its a primary, secondary, or tertiary action.

| Homepage | | | | |
|-----------------|---------------------------|--------------------|-------------------------------|---------------------|
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| | Baseline | 68% | | |
| | Version 1 | | | |
| | Version 2 | | | |
| | Version 3 | | | |
| RECOMMENDATIONS | 1 | 2 | 3 | 4 |

A single data point entered into the Interaction Matrix.

The Success Key will give you the exact percentages that map to different levels of success for each action. Primary actions should be the most noticeable and usable actions on the page, so we expect the percentage of successful participants to be at least above 80%. A percentage in the 90's means that your action is performing above average, and shouldn't be tweaked!

| 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% |

Success percentages for each type of action in the Interaction Matrix.

By contrast, tertiary actions are typically more hidden on the page, so we don't expect more than 55-65% of participants to successfully find those actions on their first click.

Once all the data points for your first round have been entered, you'll see a color coded map of exactly where you need to improve in your designs. As you might imagine, red is bad! And in our first round of testing on our eCommerce site Getup, we found that many of our high priority actions on the page were clearly underperforming.

| Homepage | | | | |
|-----------------|---------------------------|--------------------|-------------------------------|---------------------|
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| | 1 | 2 | 3 | 4 |
| | | | | |

The first row of data entered into the Interaction Matrix from each question in a test.

Each round of data points will lead us to a following round of making recommendations for the design. Ideally, we all have designers on standby who can help make suggestions on where the design can improve.

That typically isn't the case, so one of the most important aspects of the IM process is willingness to try new things. Even if you don't have much technical expertise, knowledge of your business is enough to drum up ideas of how to improve your users' experiences.

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|-----------------|--|---|---|---------------------|
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| | Version 2 | | | |
| RECOMMENDATIONS | Version 3 | | | |
| | 1. Emphasize "Shop this Look" Provide a color that stands out from product images above | 2. Relocate calendar icon Shoppers selected the calendar icon instead of the link. | 3. Rename "Style Guide" There are several actions on the page that allude to providing style advice. | N/A |

A round of recommendations provided based on the first round of data.

The goal is to come up with these recommendations quickly, as if they are expendable. This allows you to be in a rapid test & learn mindset where you can quickly turn around design updates and gather more data in a matter of hours. We received 100 responses from our eCommerce audience in just 3 hours! This rapid testing allows us to make decisions driven by data and improve aspects of our site on a near daily basis.

After making revisions based on your first round of data, the testing itself is the easiest part of keeping this process going. Since we're doing a second round of testing on the same page, and ideally the same actions, setting up the test is easy as copy & paste. Helio's test copy action allows you to duplicate your first survey, and from there you can simply swap out the images of the designs and your second test is ready to go! Helio's also gives the option to make a custom template of your test, which will live on the Templates page in your account for future use if you go that route.

| | | Homepage | | | |
|-----------------|-----------|--|---|---|---------------------|
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| | | | | | |

2 rounds of data entered into the Interaction Matrix, along with the 2nd round of recommendations.

Now that you're in the habit of rapidly making recommendations and testing your ideas, the rest of your Interaction Matrix should fill out quickly. Once you have several lines loaded with data, you'll hopefully start to see trends of improvement across your design variations. It's most common for your IM to start out with more red in the first rounds, and then benefit from your recommendations in subsequent tests.

| | | Homepage | | | |
|-----------------|-----------|--|---|---|---------------------|
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| | | | | | |

A 3rd round of data in the Interaction Matrix, showing improvement across several of the actions.

If you'd like to see more complete examples of the Interaction Matrix besides just our eCommerce company Getup, check out our B2B and B2C examples in the next section!

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.

Selling the results to your team

Helio makes the set up and implementation of the Interaction Matrix easy. If you don't even have an account yet, you can sign up for free and create your interaction matrix test without having to punch in any payment information! The Interaction Matrix template in this guide is also available for anyone to use, and you can quickly create a copy to fill in your own actions. This gives you 2 concrete items to bring to your team if they're not yet convinced of the IM's value.

One of the keys to proving the success of the Interaction Matrix is making sure everyone understands the data being brought to the table. The IM's key means you can quickly

translate the meaning of the data, and the color-coded aspect means that anyone who takes a glance can tell what's going on. If not, the learning curve is simple: green is good, and red is bad.

| 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% |

Success percentages for each type of action tested on your designs.

Once the first round of data is in the bag, you want your team to be in a fail-fast mentality. That means, come up with new ideas quickly and put them to the test. Helio's rapid usability testing can get you multiple rounds of data on your designs in a single day, allowing your team to go from concept phase to production very quickly. The speed of this learning cycle should have any project manager drooling on the floor.

If you have any questions about the Interaction Matrix or how to set up your own IM framework, don't hesitate to reach out to our team!

Need Testing Services?

Let us do your testing with Helio On Demand

We create, run and synthesize your tests for your team using the Helio platform. The price is an additional 30% of your monthly Helio subscription. There are no hours or additional contracts to manage. [Learn More](#)

We'll recruit participants for you with a Research Study

It's time-consuming to recruit participants for your research studies. We'll find the right participants based on the specific attributes you share with our advocacy team. [Learn More](#)

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We help you mature your product, creative or research process by bringing in weekly and monthly accountability. We run the meetings, produce the work and provide an executive summary. With the Test and Learn program, there are no hours or additional contracts. [Learn More](#)