

The Friction-Free SaaS UX Checklist

Phase 1: The SaaS UX Audit

- ☐ **Extract historical session data:** Gather analytics and recordings from a minimum of 500 user sessions to establish a reliable baseline of systemic behaviors.
- ☐ **Isolate 24-hour drop-offs:** Map your user activation funnel to pinpoint exactly where the sharpest drop-offs occur within a user's first 24 hours on the platform.
- ☐ **Categorize support logs:** Audit recent support tickets to determine if user friction stems from interface ambiguity or actual technical bugs.
- ☐ **Evaluate the first three screens:** Review the post-registration dashboard and the immediate two pages following it to isolate cognitive and interaction friction.
- ☐ **Audit session replays for pauses:** Review user recordings specifically to spot long pauses, repeated back-and-forth navigation, or erratic cursor movements.
- ☐ **Track technical frustration signals:** Scan error logs and analytics for occurrences of rage clicks, failed form submissions, and slow page load times.
- ☐ **Run a 5-user usability test:** Recruit five users for direct usability testing to uncover up to 85% of your core structural design bottlenecks.

Phase 2: Sign-Up & Registration Minimization

- ☐ **Strip secondary data fields:** Remove all non-essential fields from the initial sign-up flow, leaving only email and password inputs.
- ☐ **Defer profile configuration:** Move advanced profile setup, company sizing, and role selection questionnaires into the post-onboarding experience.

- ☐ **Deploy real-time inline validation:** Implement instant validation formatting to check password strength and email syntax while the user types.
- ☐ **Stabilize mobile inputs:** Verify that form fields and validation messages remain completely stable within mobile viewports without shifting inputs out of view.
- ☐ **Provide clear error messaging:** Write validation error messages that state exactly how to resolve the input error rather than using generic error codes.

Phase 3: Contextual Help & Progressive Disclosure

- ☐ **Map 5-second hesitation points:** Locate fields or steps where session recordings show users consistently pausing for more than five seconds.
- ☐ **Embed inline tooltips:** Insert targeted, non-intrusive tooltips directly next to complex labels, compliance requirements, or data fields.
- ☐ **Hide advanced configurations:** Move deep settings, secondary menu choices, and expert features behind secondary tabs or collapsible menus.
- ☐ **Prioritize primary actions:** Design the default dashboard layout to emphasize only the core action buttons needed for a user to reach the initial value.

Phase 4: Post-Deployment Validation

- ☐ **Track live funnel metrics:** Monitor behavioral funnels immediately after shipping updates to confirm a downward trend in step drop-off rates.
- ☐ **Measure support ticket volume:** Compare post-update support logs against your baseline data to ensure a reduction in interface-related inquiries.
- ☐ **Monitor feature adoption rates:** Evaluate active feature usage over a three-to-six-week testing window to confirm increased engagement with core tools.