

# UX Audit Process For SaaS & Digital Products | Executive-Ready & Actionable

A **UX Audit** is a structured evaluation of a digital product to uncover usability barriers, design discrepancies, and user experience gaps that impact engagement, retention, and conversion. It combines data analytics, heuristic evaluation, user behavior insights, and stakeholder context into a synthesis that drives meaningful UX improvements.

# Define Audit Goals & Scope

Start by clearly documenting:

## Business Objectives

- What problem are you solving? (e.g., reduce churn, increase activation, improve onboarding conversion.)
- What business metrics are tied to success? (e.g., retention rate, task completion, engagement).

## Target Users & Journeys

- Identify key user segments and core user journeys.
- Specify which areas of the product are in scope (mobile app, web UI, dashboard flows, onboarding, etc.).

## Deliverables for Step 1

- Audit brief with business goals
- Defined UX success metrics (KPIs)
- Scope document

# Gather Quantitative Data

Pull performance and usage data from analytics to establish where users struggle:

## Key analytics sources

- Analytics tools: Google Analytics, Mixpanel, Amplitude
- Session recordings (Heatmaps, click maps, scroll maps)
- Funnel reports, drop-off points, engagement statistics

### Look for:

1. High drop-off steps
2. Low activation metrics
3. Frequent errors or abandonment patterns

**Outcome:** A data map of behavior trends that guides deeper examination.



# Conduct Heuristic & Usability Evaluation

A UX heuristic review applies expert judgment to evaluate usability against best-practice principles (such as Jakob Nielsen's heuristics).

## Checklist items include

- Clarity of navigation & layout
- Readability & language simplicity
- Error feedback and recovery mechanisms
- System status visibility
- Consistency and predictability

**Outcome:** A prioritized list of structural and interaction issues.

# Perform Qualitative UX Research

Use research methods to understand *why* users behave the way they do. Combine *research in SaaS* with your audit for deeper insight:

## Methods

- User interviews (target churned and retained users)
- Contextual inquiry & observational testing
- Usability testing sessions on key tasks
- Feedback collection (surveys, open-ended responses)

## Activities

- Test core user flows (onboarding, feature use, billing, etc.)
- Ask users what stopped them from completing tasks
- Note cognitive challenges or emotional frustration

**Outcome:** Rich qualitative insights that explain the behavior behind the numbers.



# Accessibility & Technical Evaluation

Check your product against accessibility standards (WCAG) and technical barriers:

## Accessibility checks

- Color contrast & visual clarity
- Keyboard navigation compatibility
- Screen-reader support

## Technical performance

- Load times & response delays
- Broken links or incomplete interactions

**Outcome:** Identify non-UX but critical technical and inclusivity issues that impact experience.



# Synthesize Findings & Prioritize

Combine insights from data, heuristics, and user research into a **unified UX Audit Report**:

## What to include



Executive summary for leadership



Problems identified, with evidence



Impact on KPIs and business goals



Severity prioritization (High, Medium, Low)



Quick wins vs long-term improvements



**Tip:** Prioritize fixes by *impact & effort* so teams can act quickly.

# Recommend UX Improvements & Next Steps

Your audit must go beyond observations to provide **actionable recommendations**:

Recommendations should include



What needs to change



Why it matters



How to measure impact



Who owns the fix

Align recommendations to:

- UX best practices
- Product & growth goals
- Customer needs

This transforms audit outcomes into strategic actions.



# Follow Through: Implementation & Measurement

The audit is not complete until changes are implemented and measured.

## Implementation cycle:



Work with Product & Engineering  
to apply fixes



Run A/B tests where applicable



Track changes in:

- Retention/Churn metrics
- Task success rates
- User satisfaction scores

**Outcome:** Validate that UX improvements caused meaningful business impact.



# Essential UX Audit Deliverables

Deliverable	Purpose
Audit Brief & Scope	Set direction & expectations
Data & UX Research Summary	Evidence base for findings
UX Heuristic Evaluation	Expert usability review
Qualitative Research Insights	User motivations + frustrations
UX Audit Report	Prioritized findings + recommendations
Implementation Roadmap	Next steps + measurement plan



# Need Expert UX Support?

## Drive Better Retention & Smarter UX Decisions with UXGen Studio

Every great UX audit should lead to action—but turning insights into impactful product improvements requires strategy, discipline, and execution expertise.

At UXGen Studio, we help SaaS and digital product teams:

- Uncover deep user insights and hidden friction
- Translate research into prioritised UX improvements
- Reduce churn and accelerate retention
- Improve activation, engagement, and conversion
- Align UX strategy with business outcomes

Whether you're just starting your UX Audit or ready to evolve your UX practice into a growth engine, we can help you turn research into measurable results.





# How We Partner With You

## Strategic UX Consulting

- UX research planning & execution
- Usability testing & user interviews
- Churn analysis & retention UX strategies

## UX Audit to Action

- Prioritised UX recommendations
- Roadmaps aligned to product goals
- Design system & UI improvements

## Implementation Support

- UX design + prototyping
- Collaboration with product & engineering
- Ongoing measurement & optimisation

# Why UXGen Studio?

We don't just design interfaces - we solve product challenges with clarity, data, and human insight. Our work helps product leaders make confident decisions backed by research, not guesswork.

## Here's what you gain when you work with us:



Business-aligned recommendations, not generic UX tips



Actionable priorities that move KPIs



Faster impact with structured UX frameworks



Hands-on collaboration with product teams

# Free UX Audit Support Offer

As a thank-you for reading this document, we offer a complimentary 30-minute UX strategy consultation for teams serious about reducing churn and boosting retention.

**Book your FREE session now**



# Let's Connect

If you found this UX Audit Process valuable, imagine what a tailored engagement could do for your product.

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