

● ABOUT ANODA

Product design for complex software.

ANODA helps teams make complex digital products easier to understand and use. We work across B2B platforms, SaaS, AI products and developer tools, combining UX research, product design and frontend development.

01

Find the friction

UX audits and research grounded in product evidence.

02

Design the next step

Clear workflows, interface states and shared design systems.

03

Help teams ship

Implementation-ready design and frontend development.

This sample shows how we connect evidence, priorities and practical next steps in a product audit.

Explore ANODA →

● A PUBLIC SAMPLE OF AN ACTIONABLE PRODUCT AUDIT

Turn customer context into the next clear action.

CRM usability & feature audit

A review of the current ANODA CRM desktop experience – from deal capture to follow-up, relationship history and management reporting.

32

UX findings + 2 accessibility

8

product clusters

13

P1 UX findings + 1 accessibility

01 OCTOBER 2026

LIVE PRODUCT REVIEW / ANONYMIZED EVIDENCE



● EXECUTIVE BRIEF

The CRM has context. The next action is harder to see.

The main opportunity is to connect existing records, signals and automation into a reliable daily work system.

OWNERSHIP & EXECUTION

Make responsibility visible

Owner, next action and due date should travel together across cards, tasks, conversations and call commitments.

RESPONSE OPERATIONS

Build one response queue

Identity, waiting time and responsibility matter more than a large message count when deciding whom to answer next.

DECISION CONFIDENCE

Make data explain itself

Consistent timezones, metric cohorts and source coverage reduce the need for manual reconciliation.

WHAT THIS REVIEW SUPPORTS

- Prioritize 13 P1 findings for discovery and design. No confirmed P0 catastrophe was observed in the read-only sample.
- Preserve useful foundations: stage-specific inactivity warnings, record links, timestamped call summaries and future follow-up visibility.
- Measure response speed, work scheduling and data reconciliation before estimating financial impact. Findings are risks and opportunities, not measured revenue losses.

SCOPE & EVIDENCE

A current-product audit, with explicit limits.

Authenticated desktop review of the ANODA CRM. Evidence reflects the version visible on 01 October 2026.

REVIEWED WORKFLOWS

Pipeline	Board, display settings, New deal
Deal workspace	Focus, timeline, Emails, composer
Task execution	Open list, due dates, advanced filters
Communication	Inbox list, thread, sequence detail
Records	People list, person detail, LinkedIn leads
Call intelligence	Call list and recorded-call detail
Reporting	Stats and Dashboard
Integrations	Company settings, Fathom connection, rotting settings

METHOD

One heuristic review and task walkthrough. Findings draw on live rendered UI, DOM labels and read-only navigation. No production records were created, emails sent, tasks completed or integration settings changed.

LIMITS

Selected accessibility checks completed; no conformance certification. No user study, analytics baseline, backend verification or exhaustive feature inventory. Missing controls are scoped to inspected surfaces. Role differences and edge cases require follow-up.

● DECISION FRAMEWORK

Priority is separate from business impact.

Operational priorities below are provisional. They adapt heuristic severity to CRM workflows; they are not a measured incident ranking.

P0	Critical / severity 4 Confirmed loss, unsafe action or complete core-task failure.	0 observed
P1	High / severity 3 Repeated core-work friction or material decision risk.	13 UX + 1 AX
P2	Medium / severity 2 Recoverable friction, weak guidance or missing workflow support.	16 UX + 1 AX
P3	Low / severity 1 Wording or secondary clarity improvement.	3 UX findings

BUSINESS IMPACT

A mechanism, not a dollar claim

Response delay / execution drift / data trust / decision quality / adoption.

CONFIDENCE

What was actually seen

High: direct state or comparison. Medium: visible feature gap with incomplete coverage.

EFFORT

An initial design scope

S: local change. M: shared workflow. L: cross-source data work. No delivery estimate implied.

● ISSUE MAP

Eight clusters, one connected operating model.

32 UX findings in eight product clusters. Two additional accessibility entries appear in the dedicated review and backlog.

PRODUCT CLUSTER	P1	P2	P3		MAIN BUSINESS EXPOSURE
Pipeline	3	2	0	●●●●●	Accountability / next step
Deal workspace	1	3	0	●●●●	Handoff readiness
Task execution	2	2	1	●●●●●	Execution / scheduling
Communication	3	3	0	●●●●●●	Response speed / automation
Records	1	2	1	●●●●	Relationship context
Call intelligence	1	2	0	●●●	Commitment capture
Reporting	2	0	1	●●●	Decision quality
Integrations	0	2	0	●●	Operational trust

13 P1 + 16 P2 + 3 P3 = 32 findings

● FEATURE ASSESSMENT

Prioritize workflow completeness before feature volume.

These are proposed capability improvements. Absence from an inspected surface does not establish absence from the entire product.

Pipeline & deal workspace UX-01 to 09	Stages, warnings and record links	Owner + next-step card; readiness checklist
Task execution UX-10 to 14	Task views and date controls	My work / Today / Undated; global capture
Communication UX-15 to 19	Multi-platform threads and status	Identity resolution, owner and response age
Records UX-20 to 23	People, companies and contact fields	Unified activity + repair queue
Call intelligence UX-24 to 26	Timestamped summary and follow-up	Review action items; draft handoff; provenance
Communication · outreach UX-27	Sequences, flow and queue metrics	Recipient-level enrollment inspection
Reporting UX-28 to 30	Funnels and lead-generator metrics	Cohort controls, coverage and drill-through
Integrations UX-31 to 32	Active status, freshness, backfill	Data-impact guidance and sync reconciliation

| Preserve the current strengths. Improve the handoffs between them so users do less reconstruction and more deliberate action.

PIPELINE

A pipeline card should explain the next move.

P1 UX-01 P1 UX-02 P2 UX-04 Live observation + proposed improvement · Not illustrated: UX-05

ANODACrm

ADMIN

Leads

Deals

Tasks

Inbox

2227

RECORDS

People

Companies

Calls

OUTREACH

Sequences

Campaigns

LEADGEN

My follow-ups

0

Jobs

Bids

Stats

Dashboard

Deals 63

Search deals, people, companies...

96K

+ Add deal

New conversation 58
\$580,000

Qualified 1
\$0

Sent to estimate 2
\$20,000

Proposal follow ... 1
\$10,000

Paperwork 1
\$10,000

Contact 1 - Project opportunity
Company 1
\$10,000
No activity
1d

Contact 2 - Project opportunity
Company 2
\$10,000
No activity
1d

Contact 3 - Project opportunity
Company 3
\$10,000
No activity
1d

Contact 4 - Project opportunity
Company 4
\$10,000
7d No activity

Contact 5 - Project opportunity
Company 5
\$10,000
No activity

Contact 59 - Project opportunity
Company 59
\$10,000
Planned
26d

Contact 60 - Project opportunity
Company 60
\$10,000
Planned
0d

Contact 61 - Project opportunity
Company 61
\$10,000
43d

Contact 62 - Project opportunity
Company 62
\$10,000
Tuesday

Contact 63 - Project opportunity
Company 63
\$10,000

E01 / Anonymized UI Local reproduction of current UI; record content and amounts replaced.

- OBSERVED
- 1 Owner is absent from cards.
 - 2 Planned omits task and date.
 - 3 Age and idle signals share short day values.
- BUSINESS RISK
- A manager sees pipeline state, but must open records to establish responsibility and action.
- VALIDATE IMPACT
- Track unassigned deals and deals without dated next steps. Test scan accuracy.

RECOMMENDED CHANGE

Add an owner and a dated next-step line. Offer My deals, Unassigned and At risk presets; keep inactivity warnings.

ACCEPTANCE CHECK

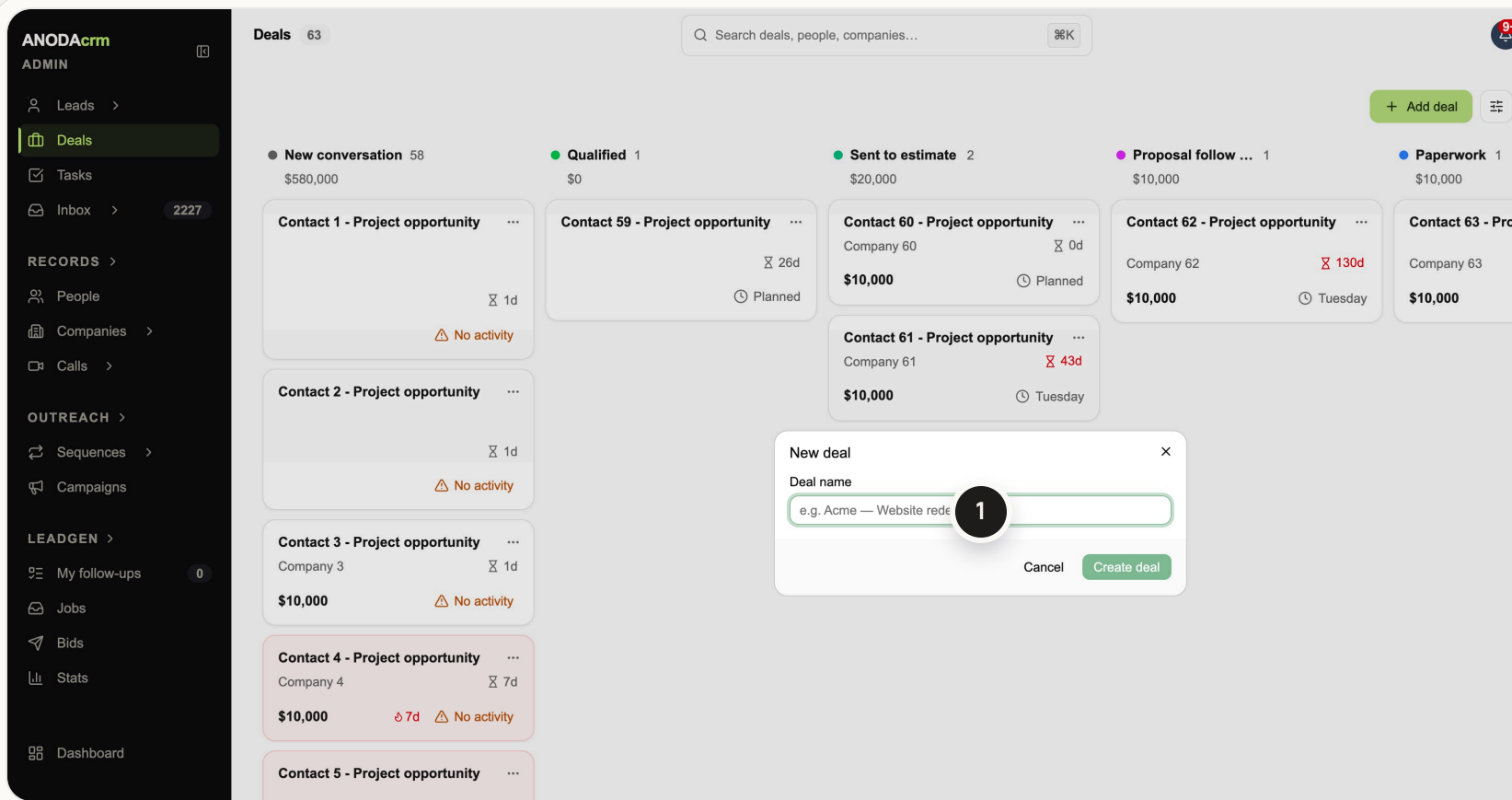
Given a target card, users name its owner, next action and deadline without entering detail.

PIPELINE

Quick capture needs a clear path to readiness.

P1 UX-03

Live observation + proposed improvement



E03 / Anonymized UI Local reproduction of current UI; record content and amounts replaced.

OBSERVED

New deal offers a name field only. The modal does not capture a contact, owner or next step.

1 UX-03 Deal creation captures a name only

BUSINESS RISK

The record can enter the pipeline before the information needed for a useful handoff is available.

VALIDATE IMPACT

Measure setup completion and creation-to-ready time.

RECOMMENDED CHANGE

Add lightweight contact/owner selection and a follow-up date, or a post-capture Finish setup checklist.

ACCEPTANCE CHECK

A new deal can be captured quickly and then made ready for another salesperson without reconstruction.

● DEAL WORKSPACE

Turn a detail page into a handoff workspace.

P2 UX-06

P2 UX-07

P2 UX-08

Live observation + proposed improvement

The screenshot shows the ANODA CRM interface. The sidebar on the left contains navigation links: ADMIN, Leads, Deals (highlighted), Tasks, Inbox (2227), RECORDS, People, Companies, Calls, OUTREACH, Sequences, Campaigns, LEADGEN, My follow-ups (0), Jobs, Bids, Stats, and Dashboard. The main area displays a deal workspace for 'Contact A - Website design project'. At the top, there's a search bar and a status bar with 'Unassigned', 'Owner', 'Won', and 'Lost' buttons. Below this is a timeline showing stages: 'New conversation' (green), '27 days · Qu' (green), 'Sent to estimate' (blue), 'Proposal follow up' (blue), and 'Paperwork' (blue). A 'Focus' section contains a 'To-do tasks' list with one task: 'Update the deal history and current status for Contact A'. A 'TIMELINE' section shows events: 'Update the deal history and current status for Contact A' (30 Sep 2026, 22:39), 'Note added' (4 Sep 2026, 10:32), 'Moved to Qualified' (10:28), and 'Deal created' (10:27). A 'SCOPE' section lists project details like Project, UI/UX, Dev, Info arch, and Hashtags. A 'LEGAL & BILLING' section is at the bottom. Annotations 1, 2, and 3 highlight specific areas for improvement: 1 points to the 'Channel' field in the 'DEAL' section; 2 points to the 'Update the deal history and current status for Contact A' task in the 'To-do tasks' list; 3 points to the '27 days · Qu' stage in the timeline.

E04 / Anonymized UI Local reproduction of current UI; record content and amounts replaced.

OBSERVED

- 1 Empty metadata competes with readiness.
- 2 Timeline events omit actor and previous state.
- 3 Completed and current stages share green styling.

BUSINESS RISK

Users must reconstruct what is missing and what changed before deciding on the next move.

VALIDATE IMPACT

Measure preparation time and handoff comprehension.

RECOMMENDED CHANGE

Add a compact readiness summary and explicit event verbs, actor and source. Separate current from completed stages.

ACCEPTANCE CHECK

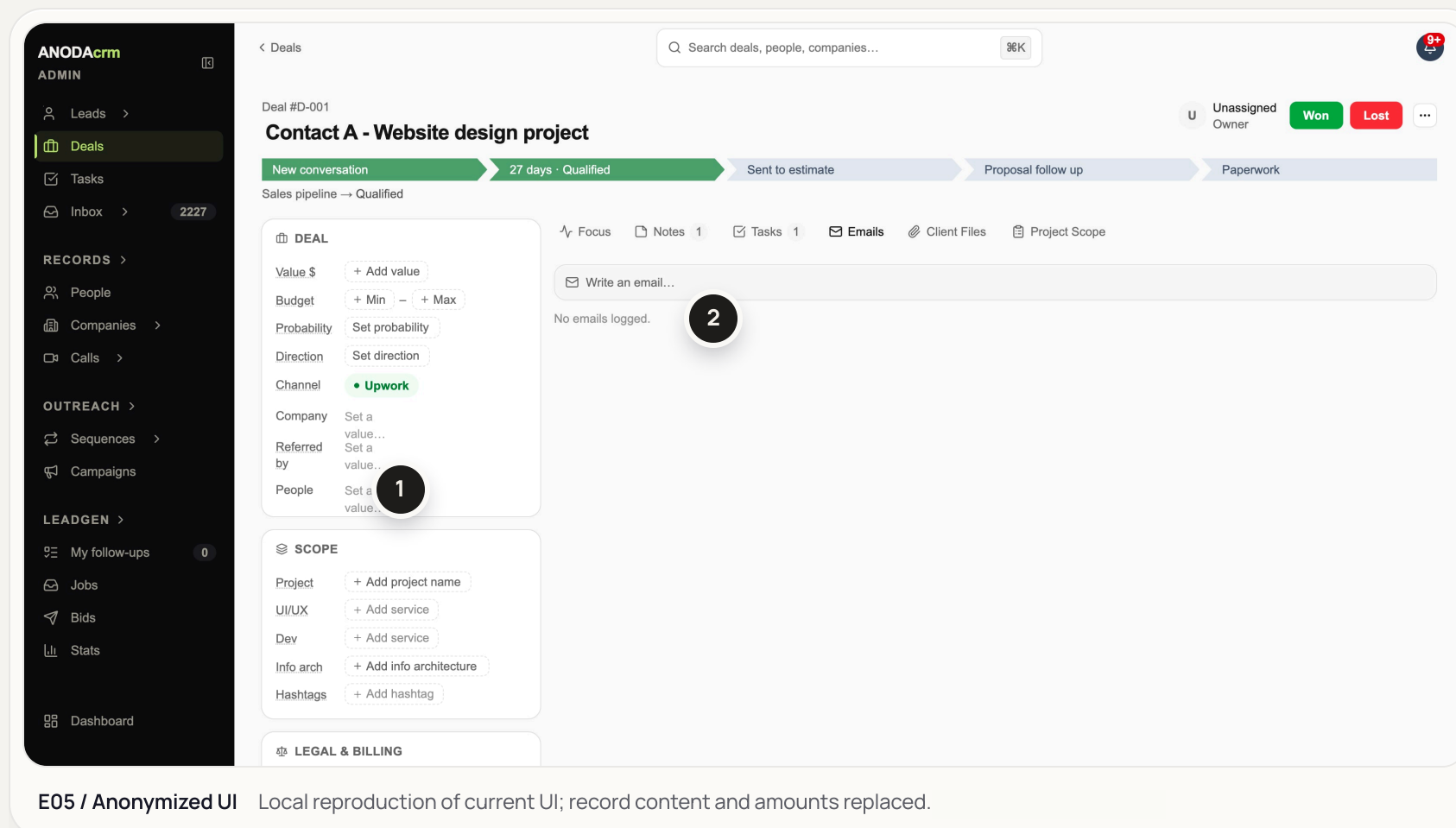
Users explain stage, missing prerequisites and the latest change from a single view.

● DEAL WORKSPACE

Explain why correspondence is empty.

P1 UX-09

Live observation + proposed improvement

**OBSERVED**

- 1 The deal has no linked person.
- 2 Emails says No emails logged and offers Write an email; the composer recipient is empty.

BUSINESS RISK

The user cannot distinguish missing contact context from a genuinely empty history or a sync problem.

VALIDATE IMPACT

Measure successful empty-state recovery and time to find relevant messages.

RECOMMENDED CHANGE

Render a state-aware explanation and Link a contact / Check mailbox actions. Require deliberate recipient selection.

ACCEPTANCE CHECK

The user identifies the cause and reaches the correct correspondence or a clear recovery route.

TASK EXECUTION

Make dated, owned work the daily default.

P1 UX-10

P1 UX-11

P2 UX-12

Live observation + proposed improvement · Not illustrated: UX-13, UX-14

ANODACRM

ADMIN

Leads

Deals

Tasks

Inbox

RECORDS

People

Companies

Calls

OUTREACH

Sequences

Campaigns

LEADGEN

My follow-ups

Jobs

Bids

Stats

Dashboard

Tasks

All records

All 855 Overdue 1 Open 1 Ant tasks 41 Archived 192

17 of 855 Columns

Sort Filter Reset

co	TASK	ON	PARTY	SOURCE	STATUS	DUE	ASSIGNEE	ADDED
☐	Follow up contact@example.com Project 1	Project 1	ANODA	Manual	3	28 Aug		25 Aug 2026
☐	Follow up contact@example.com Project 2	Project 2	ANODA	Manual	—	6 Oct	Dem...	30 Sep 2026
☐	Follow up contact@example.com Project 3	Project 3	ANODA	Manual	—	6 Oct	Dem...	30 Sep 2026
☐	Follow up contact@example.com Project 4	Project 3	ANODA	Manual	—	6 Oct	Dem...	30 Sep 2026
☐	Follow up contact@example.com Project 5	Project 5	ANODA	Imported	—	6 Oct	Dem...	23 May 2026
☐	Follow up contact@example.com Project 6	Project 6	ANODA	Imported	—	7 Nov	Demo owner	7 May 2026
☐	Follow up contact@example.com Project 7	Project 7	ANODA	Manual	2		Dem...	21 Aug 2026

E07 / Anonymized UI Local reproduction of current UI; record content and amounts replaced.

OBSERVED

Broad view tabs lead the page. Open rows have empty Status values; some tasks have Set date and no dedicated Undated view.

- 1 UX-10

2 UX-11

3 UX-12
- Daily work requires manual filter construction
- Undated work is not a first-class exception
- Open tasks display an empty Status column

BUSINESS RISK

An open task can remain outside dated work queues, while personal priorities require manual filtering.

VALIDATE IMPACT

Measure time to first action and the number of undated open tasks.

RECOMMENDED CHANGE

Add My work, Today and Undated views; clarify status; provide global capture and bulk scheduling.

ACCEPTANCE CHECK

Users find their next task, schedule an undated item and create work from the task queue.

● COMMUNICATION

Prioritize waiting customers, not just recent activity.

P1 UX-15

P1 UX-17

P2 UX-18

Live observation + proposed improvement

ANODACrm

ADMIN

Leads

Deals

Tasks

Inbox

Email

Behance

Dribbble

RECORDS

People

Companies

Inbox

Conversations

71 need a reply

All 150

Needs reply 71

150

Columns

Sorted by Last activity

Filter

CONVERSATION	STATUS	PLATFORM	INITIATOR	MSGS	DEAL	LINKS	LAST ACTIVITY
Unknown Example message preview.	Needs reply	dribbble	Demo mailbox	1	Project 2	Project 2	29 Sep 2026, 11:00
Contact 3 Example message preview.	Needs reply	dribbble	Demo mailbox	2	Project 3	Project 3	29 Sep 2026, 11:00
Unknown Example message preview.	Replied	dribbble	Demo mailbox	9	—	Project 4	28 Sep 2026, 09:00
Unknown Example message preview.	Replied	dribbble	Demo mailbox	9	—	Project 5	28 Sep 2026, 09:00
Unknown Example message preview.	Replied	dribbble	Demo mailbox	9	—	Project 6	28 Sep 2026, 09:00
Unknown Example message preview.	Replied	dribbble	Demo mailbox	9	—	Project 7	28 Sep 2026, 09:00
Unknown Example message preview.	Replied	dribbble	Demo mailbox	6	—	Project 8	25 Sep 2026, 11:00
Contact 9 Example message preview.	Needs reply	behance	Demo mailbox	1	Project 9	Project 9	21 Sep 2026, 11:00
Unknown Example message preview.	Replied	behance	Demo mailbox	19	Project 10	Project 10	20 Sep 2026, 11:00

E08 / Anonymized UI Local reproduction of current UI; record content and amounts replaced.

OBSERVED

The Inbox has Needs reply, but its visible columns omit owner and waiting age. Unknown identities and several unrelated counters add interpretation work.

- 1

UX-15 Known contacts still appear as Unknown
- 2

UX-17 Needs reply does not form an accountable response queue
- 3

UX-18 Inbox counters use different units without explanation

BUSINESS RISK

The team must infer who needs a reply and who is responsible before acting.

VALIDATE IMPACT

Measure first-response time and aged unanswered conversations.

RECOMMENDED CHANGE

Provide My replies and Oldest unanswered queues, waiting age and owner. Resolve identity and clarify counter units.

ACCEPTANCE CHECK

A salesperson identifies their oldest unanswered thread and its linked contact from the queue.

● COMMUNICATION

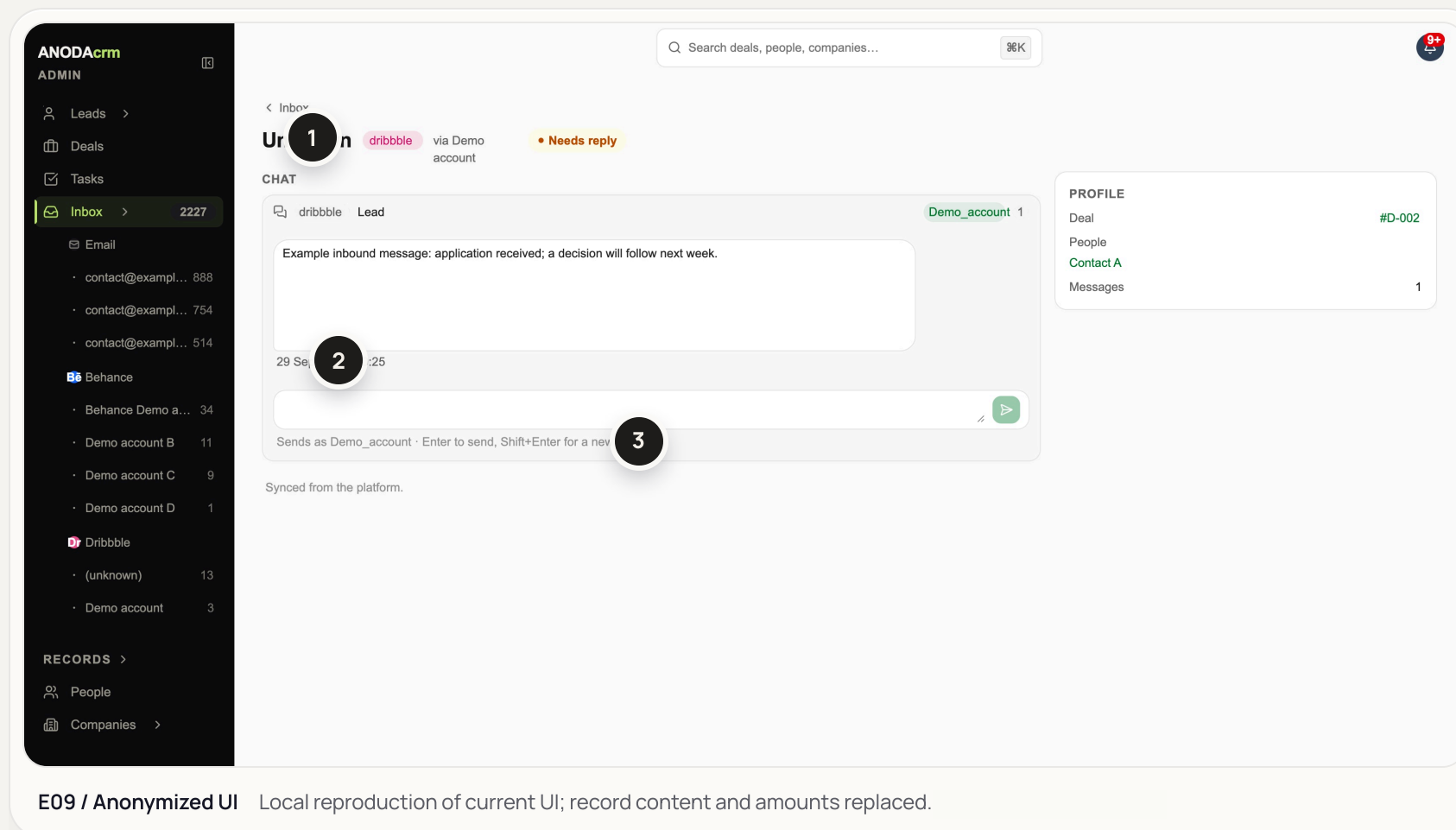
Keep identity and time consistent across a conversation.

P1 UX-15

P1 UX-16

P2 UX-19

Live observation + proposed improvement · Not illustrated: UX-27

**OBSERVED**

- 1 The header says Unknown while Profile has a linked contact.
- 2 One single-message thread differs by three hours between list and detail.
- 3 Enter sends.

BUSINESS RISK

Recognition, response-age judgement and multi-line composition all need extra care.

VALIDATE IMPACT

Test timestamp equality, identity consistency and multi-line reply composition.

RECOMMENDED CHANGE

Use one identity model and user timezone across surfaces. Make sending deliberate with a clear shortcut.

ACCEPTANCE CHECK

The same message time matches across views; the contact is recognizable; Enter safely adds a line.

● RECORDS

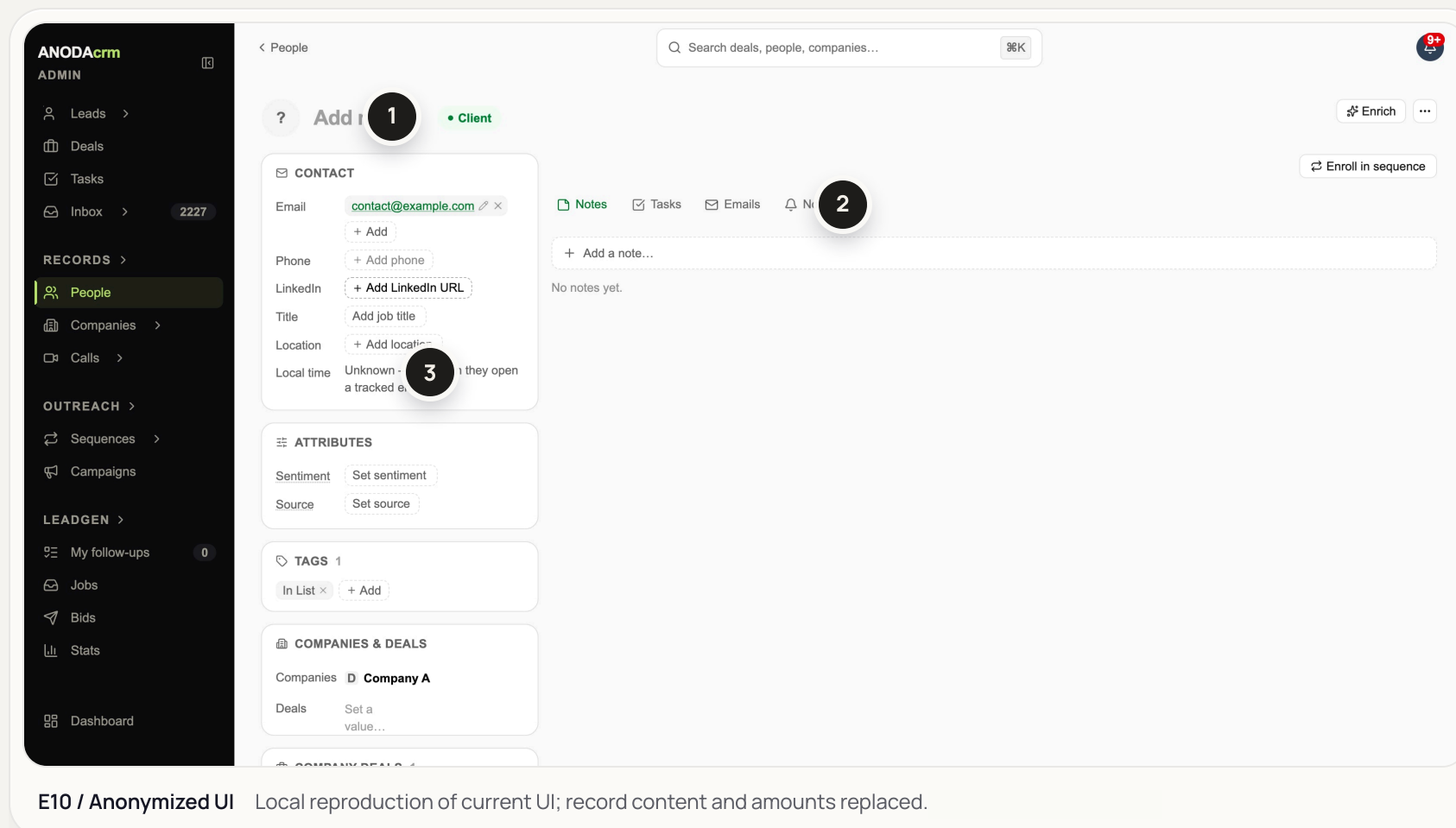
Start relationship work with context, not empty notes.

P1 UX-20

P2 UX-21

P2 UX-22

Live observation + proposed improvement · Not illustrated: UX-23

**OBSERVED**

- 1 An unnamed record has an email and company.
- 2 The default panel is empty Notes, with activity split into tabs.
- 3 Local time depends on tracked-email opening.

BUSINESS RISK

Users must repair identity and reconstruct interaction history before preparing a conversation.

VALIDATE IMPACT

Measure contact-preparation time and incomplete identities.

RECOMMENDED CHANGE

Add unified activity, a Needs review queue and explicit timezone provenance. Use clear CRM membership labels in imported leads.

ACCEPTANCE CHECK

Users recognize the contact, find the latest interaction and confirm scheduling context from one record.

CALL INTELLIGENCE

A recorded commitment should become reviewed work.

P1 UX-24

P2 UX-25

P2 UX-26

Live observation + proposed improvement

ADMIN

Leads >

Deals

Tasks

Inbox > 2227

RECORDS >

People

Companies >

Calls >

OUTREACH >

Sequences >

Campaigns

LEADGEN >

My follow-ups 0

Jobs

Bids

Stats

Dashboard

DA Demo admin

- Example project discussion
- Example project discussion
- Confirm the scope and send an updated proposal.

BUDGET & PRICING REACTION

- Confirm the scope and send an updated proposal.

OBJECTIONS & CONCERNS

- Example project discussion

DECISION CRITERIA & STAKEHOLDERS

- Confirm the scope and send an updated proposal.

DEADLINES & IMPORTANT DATES

None mentioned

BLOCKERS & PRIORITIES

None mentioned

Related tasks

ANODA TASKS

None

CLIENT TASKS

None

Follow-up

Example project discussion

Confirm the scope and send an updated proposal.

Copy

E11 / Anonymized UI

Local reproduction of current UI; record content and amounts replaced.

OBSERVED

- 1 This call contains next steps in prose, but Related tasks says None for both parties.
- 2 Insights have no local source links; Follow-up ends at Copy.

BUSINESS RISK

Useful call intelligence can stop before ownership, scheduling and follow-up tracking.

VALIDATE IMPACT

Track reviewed calls, task conversion and call-to-draft time.

RECOMMENDED CHANGE

Introduce Review action items, task acceptance with owner/date, insight provenance and Create email draft.

ACCEPTANCE CHECK

Every proposed action is accepted, dismissed or left explicitly unresolved; follow-up drafts require review.

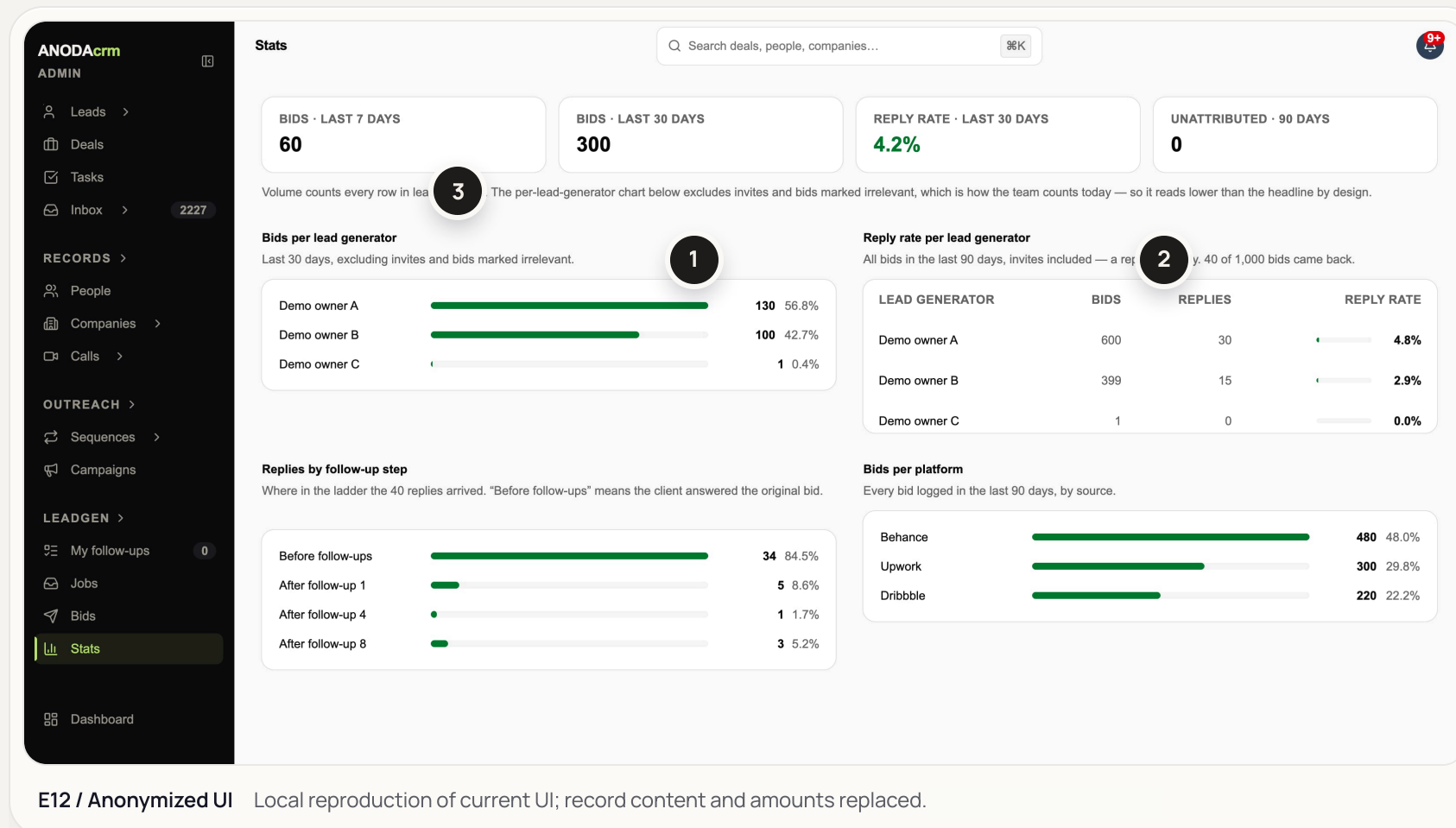
● REPORTING

Make every comparison show its population.

P1 UX-28

P3 UX-30

Live observation + proposed improvement · Not illustrated: UX-29

**OBSERVED**

Stats places 30-day and 90-day sections together with different inclusion rules. Technical names appear in explanations. Dashboard zeros lack coverage state.

1 2 UX-28 Adjacent metrics use different cohorts

3 UX-30 Metric definitions expose storage terminology

BUSINESS RISK

A plausible comparison can still use incompatible cohorts or incomplete outcome coverage.

VALIDATE IMPACT

Test cohort comprehension and reconcile funnel outcomes with source records.

RECOMMENDED CHANGE

Use a shared window control, cohort chips and definitions. Expose source coverage and drill-through for funnel stages.

ACCEPTANCE CHECK

Users can explain the denominator, time window and coverage of a metric before making a decision.

● INTEGRATIONS

Freshness is useful. Explain effects and exceptions too.

P2 UX-31 P2 UX-32 Live observation + proposed improvement

ANODAcrm

ADMIN

Leads

Deals

Tasks

Inbox2227

RECORDS

People

Companies

Calls

OUTREACH

Sequences

Campaigns

LEADGEN

My follow-ups0

Jobs

Bids

Stats

Dashboard

< Settings / Fathom connections

Q Search deals, people, companies...%K

9+

SALES CADENCE

- Deal rotting
- Leadgen → CRM handoff

LEADGEN

- Bid variables
- Platforms & accounts
- Job qualification
- Portfolio & autobid

ESTIMATION

- Rates
- Estimates

CONTENT

- Email aliases

INTEGRATIONS

- Cal.com
- Fathom

Document templates

AI prompts

ACCESS

- User management
- Deal routing

Fathom connections

Add each person's Fathom API key here; the CRM pulls their calls every 30 minutes. Park an account as inactive to keep its calls but stop syncing (e.g. people who've left).

contact@example.com

Active

2ago

Backfill

Make inactive

+ Connect account

1

E13 / Anonymized UI Local reproduction of current UI; record content and amounts replaced.

OBSERVED

Make inactive explains retained calls. Remove has no nearby history-impact explanation. Sync shows freshness but no reconciliation details.

- 1 UX-31 Remove has no visible data-impact explanation
- 2 UX-32 Sync freshness lacks a reconciliation view

BUSINESS RISK

Administrators have limited support for predicting a removal or diagnosing a missing call.

VALIDATE IMPACT

Measure missing-call diagnosis time and removal-action comprehension.

RECOMMENDED CHANGE

Add precise data-impact guidance and a sync log showing imported ranges, counts, exclusions and recoverable errors.

ACCEPTANCE CHECK

Users predict an action before committing it and explain the import status of an expected call.

● IMPLEMENTATION SEQUENCE

Fix shared foundations, then connect the workflows.

A dependency-led plan. Phase labels describe sequence, not a promised delivery schedule.

01

Trust & definitions

AX-01 · UX-15, 16, 28, 29

Fix keyboard access. Normalize identity/timezone. Agree metric cohorts, source coverage and exception semantics.

Data source owners + product lead

02

Daily execution

UX-01, 02, 03, 09, 10, 11, 17

Make ownership and next steps visible. Add personal queues and guided empty-state recovery.

Product designer + CRM engineering

03

Commitment handoffs

UX-20, 24-30

Connect contact history, reviewed call tasks, follow-up drafts, inspectable enrollments and reporting populations.

CRM engineering + operations

04

Clarity & administration

Remaining P2/P3 findings

Improve labels, timeline context, stage state, import repair and sync diagnostics.

Designer + relevant module owners

Start with explicit data contracts for identity, timestamps and task state. Otherwise new UI may present the same unresolved ambiguity more attractively.

BUSINESS MEASUREMENT

Replace assumed losses with observable outcomes.

Establish a baseline before rollout. Compare comparable teams, cohorts and periods after adoption; avoid attributing every change to design.

Response speed UX-15 to 19	Median and upper-percentile first-response time	Inbound received to first substantive outbound reply; define business hours and exclude automated receipts.
Execution reliability UX-01, 02, 10, 11	Dated next-step coverage	Active deals with owner + open dated next step / eligible active deals; track undated work separately.
Call follow-through UX-24 to 26	Reviewed action-item conversion	Proposed items accepted into linked tasks, with owner/date, or explicitly dismissed; report unresolved items.
Decision confidence UX-28, 29	Metric reconciliation and coverage	Match funnel outcomes to source events and track unknown/incomplete coverage; do not count missing as zero.
Efficiency UX-06, 10, 20	Preparation and action-finding time	Timed comparable tasks before/after; report sample, median, failures and observed workarounds.
Data health UX-01, 03, 21	Incomplete identity and ownership	Count actionable repair exceptions, new incomplete records and time to resolve.

Financial impact can be estimated later from measured change, eligible volume and an agreed cost or value model. Do not convert an interface observation into a revenue-loss claim.

● VALIDATION PLAN

Test the work people need to finish.

Proposed research to validate priorities. This audit did not run these tests or collect the measures below.

SALESPERSON UX-01, 02, 03	Find an unowned deal and establish its next move.	Owner + next action + date correctly identified; recovery steps and elapsed time recorded.
SALESPERSON UX-07, 20, 24	Prepare for a call with a known contact.	Latest interaction, commitments and open work recalled accurately without switching tools.
RESPONSE OWNER UX-15 to 19	Find the oldest unanswered conversation and draft a multi-line reply.	Correct thread, identity and age; no unintended sending; responsible person visible.
OPERATIONS UX-27	Explain why an enrolled recipient has no queued email.	Recipient state and reason are found without guessing from aggregate metrics.
MANAGER UX-28, 29	Compare lead-generator performance across one cohort.	Timeframe, exclusions and denominator interpreted correctly.
ADMINISTRATOR UX-31, 32	Explain the effect of removing a connection and a missing-call exception.	History impact and import status understood before taking an action.

Recruit representative sales, operations and admin users. Use synthetic records, record task outcomes and workarounds, and revise priority when observed frequency or impact differs.

● SERVICE SCOPE RECONCILIATION

What the service promises – and what is covered.

Checked against the service page on 01 October 2026. This public sample is an expert-review edition with interviews pending.

Expert review / critical workflows	COVERED	32 observations across eight clusters; read-only desktop UI review.
Interviews + usability tasks	PENDING	Service FAQ includes seven sessions, up to 45 minutes, with tasks inside them. No interviews completed in this sample.
Roles and permissions	PARTIAL	Admin view inspected. Sales, manager and restricted roles need separate test accounts; permissions have not been validated.
States and accessibility	PARTIAL	Keyboard, dialog focus, semantic names, table headers and selected contrast checked. Wider state and assistive-technology testing remains open.
Navigation / connected workflows	PARTIAL	Cross-record links reviewed. Proposed navigation and three wireframes added; task-based validation pending.
Feature discovery / AI	PARTIAL	Call summaries, related tasks, drafts and outreach reviewed. Accuracy of AI extraction requires a source-to-output sample.
Analytics / customer voice	PENDING ACCESS	Operational UI counters are not behavioral analytics. No event export, support-ticket corpus or participant answers supplied.
Evidence + severity + dependencies	EXPANDED	32 issue cards plus an ordered 19-package backlog, dependencies and acceptance checks.
Summary + team walkthrough	PARTIAL	Executive brief provided. A live team walkthrough and decisions are pending.

No participant study is represented as completed here.

● EVIDENCE & RESEARCH

One planned interview will inform four sales scenarios.

Keep the person, the task and the source separate. Scenario coverage is not a participant count.

ACTUAL SOURCE / PENDING

Owner-user interview

The owner-user can describe real work, constraints, incidents and priorities. Their answers have not yet been supplied. Record quotes, examples and stated frequency.

MODEL / PROPOSED

Four sales task lenses

Inbound, outbound/leadgen, deal owner and sales lead. These are provisional workflows; one person may perform several of them.

ACTUAL PEOPLE / PENDING

Independent validation

Recruit other real users when available. Count each participant only after their own session is completed.

INTERVIEW EVIDENCE CONTRACT

- Record role, goal, last concrete episode, obstacle, workaround, consequence and approximate frequency; mark estimates explicitly.
- Link each statement to an issue or an open question. Keep direct quotes, auditor interpretation and proposed solution separate.
- Capture task outcomes, critical errors, help needed and time on synthetic records. Ask about existing behavior before suggesting a feature.
- Until answers arrive, business ranking remains provisional; no interview quotes, saturation or measured revenue claims appear in this sample.

● INTERVIEW GUIDE

Understand the work before asking for a redesign.

A 45-minute session: context 5 min / recent episodes 10 / 2–3 tasks 20 / impact and ranking 7 / close 3.

CONTEXT	What do you do repeatedly? Who owns a lead, a reply and a deal? What makes a successful day?
RECENT FRICTION	Describe the last difficult episode: intended result, exact step, workaround and outcome. What did you check twice?
DAILY EXECUTION	How do you choose the next action? How do you discover undated or forgotten work? What makes a deal ready for handoff?
COMMUNICATION & CALLS	How do you find unanswered threads? How does a call commitment become a task and draft? What AI output do you verify?
TRUST & ACCESS	Which management decision uses these metrics? What population and exclusions matter? Which roles need which permissions?
PRIORITY & PRESERVATION	Which three problems come first, why, how often and for whom? Which existing behaviors must be preserved?

The full questionnaire contains 25 neutral questions and six observation tasks. Interview answers are pending; this page describes the protocol, not research results.

● SCENARIO COVERAGE

Four task lenses, distinct business risks.

Synthetic scenarios for expert walkthroughs. No actual sales-persona research or four-person test has been conducted.

S1 / INBOUND SALES

UX-01, 03, 09, 15, 17

Recognize a new contact, own the reply, capture a deal and plan the next step.

Risk to inspect: Wrong identity; unanswered lead; incomplete handoff.

S2 / OUTBOUND & LEADGEN

UX-16, 19, 23, 27, 28

Find an external reply, inspect enrollment state and prepare the correct follow-up.

Risk to inspect: State ambiguity; duplicate or poorly timed contact.

S3 / DEAL OWNER

UX-06, 07, 20, 24, 25, 26

Prepare a call, review commitments, create tasks and pass context to another owner.

Risk to inspect: Unscheduled promises; context lost across records.

S4 / SALES LEAD

UX-01, 02, 10, 11, 28, 29

Find unassigned / at-risk work, redistribute ownership and compare one eligible cohort.

Risk to inspect: Weak accountability; invalid management comparison.

After the interview, replace assumptions with actual responsibilities. Test success means finishing the task with correct context, not merely finding a button.

● ACCESSIBILITY / SAMPLED REVIEW

Keyboard and semantics: strengths and barriers.

Chrome desktop checks on live Tasks, Deals, Inbox and call detail. This is selected WCAG 2.2 coverage, not a conformance certification.

PASS / SAMPLED	Named dialog and textbox; initial input focus; Tab stays inside; disabled Create skipped; Escape closes; focus returns to Add deal.
New deal modal	
PASS / SAMPLED	Named dialog; Tab reaches Add filter; Escape closes; focus returns to Filter.
Advanced filter	
PASS / SAMPLED	Navigation/main landmarks; named search and notification controls; table column headers; distinct selection/completion labels; reply textbox named.
Names and structure	
PASS / SELECTED CONTRAST	Computed #666666 on white at 14 px gives approximately 5.74:1, above the 4.5:1 normal-text threshold. This is one sample, not all tokens.
Tasks neutral text	
BARRIER / AX-01	Pointer opens detail. Tab skips the conversation cell and visits related / external links. A named internal conversation link is needed.
Inbox internal thread	
GAP / AX-02	Named separators are not in Tab order; no keyboard width equivalent observed. Inventory all alternate width controls before a broader failure claim.
Column resizing	

No visible skip link observed, but main/navigation landmarks exist; absence of a skip link alone is not treated as a WCAG failure. Hidden 1 px select inputs were correctly excluded and are not counted as unnamed controls.

P1 AX-01

Make the conversation keyboard reachable.

WCAG 2.2 / 2.1.1 Keyboard · Observed barrier in sampled Inbox list

OBSERVED / REPRODUCIBLE

The clickable conversation cell opens internal detail by pointer. Its row has tabIndex -1 and no interactive role. Tab visits the table container, deal, bid, Job post and external Chat links; it skips an internal conversation entry.

BUSINESS & ACCESS MECHANISM

Keyboard-only users cannot use the same internal reading path from the sampled queue.

PROPOSED CHANGE

Make the conversation title a named internal link. Keep related and external links separate.

ACCEPTANCE / RETEST

Tab reaches a uniquely named conversation link; Enter opens the intended internal thread; back returns to a useful list position.

P2 AX-02

Make column sizing keyboard operable.

WCAG 2.2 / 2.1.1 Keyboard; review 4.1.2 Name, Role, Value · Observed component gap; alternate path inventory pending

OBSERVED / REPRODUCIBLE

Task and Inbox column resize separators have accessible labels but tabIndex -1. No width-setting equivalent was observed. Current/min/max values are absent.

BUSINESS & ACCESS MECHANISM

Pointer resizing is discoverable while a keyboard equivalent is not. Confirm all alternative sizing controls before a product-wide failure claim.

PROPOSED CHANGE

Add an accessible keyboard width control or focusable separator with arrow-key behavior and meaningful value.

ACCEPTANCE / RETEST

A keyboard-only user changes and restores column width; the control exposes its name and current value.

● REMAINING VERIFICATION

Complete the checks and record their results.

Open checks require representative roles, controlled data or genuine participants. These are planned checks, not observed defects.

ROLES / PERMISSIONS

Sales, manager, admin

Test read/write boundaries, assignment, handoff and visibility using role-specific accounts. Current admin UI cannot prove permission correctness.

STATES / RECOVERY

Empty, loading, failure, permission

Inspect retries, stale/offline data, unsaved drafts, duplicates and partial saves in controlled fixtures; do not trigger destructive production actions.

ACCESSIBILITY

Assisted use + remaining criteria

VoiceOver tasks; focus visibility/obscuring; desktop text resize/reflow; critical state contrast; target spacing; announcements; label/error relationships.

AI / DISCOVERY

Source-to-output accuracy

Compare call source, summary, action extraction, dates and drafts. Count correct/missing/invented items with actual examples; test review and dismissal.

ANALYTICS / CUSTOMER VOICE

Eligible event and support corpus

Collect event definitions, coverage and comparable baseline; classify support episodes. Interface counters alone do not establish user behavior.

RESEARCH / CONCEPTS

Real interviews + task tests

Run owner/user session now, independent users later; validate navigation and 2–3 selected wireframes. Update severity and backlog with evidence.

Keep a check log with role, scenario, state, method, result, evidence and retest date. Use Not tested / Blocked / Pass in sample / Observed failure; only an observed outcome counts as completed validation.

● BACKLOG LOGIC

Priority, work order and evidence are separate decisions.

32 UX findings + 2 accessibility entries. The ordered backlog groups them into implementable packages and validation work.

PRIORITY

Consequence and persistence

P1: major operational/access barrier. P2: material friction or ambiguity. P3: polish. No P0 confirmed. Frequency is still unknown; user answers can change ranking.

SEQUENCE

Dependencies before presentation

Define shared data states before displaying them in new queues. Fix the observed keyboard barrier early. Reporting and response foundations can proceed in parallel with named ownership.

EFFORT

Relative scope, not a quote

S: local/component fix. M: shared workflow. L: cross-source/data work. Engineering estimates days, savings and deadlines after source review.

WHY THIS PROVISIONAL ORDER

- First: access to a core workflow and shared definitions. Next: reliable daily execution, pipeline accountability and reply operations.
- Then: decision-quality reporting and call-to-task/relationship handoffs. These carry high business value but require data and source dependencies.
- After that: identity repair, outreach transparency and integration diagnostics. Clarity improvements remain visible in the backlog, not lost in a redesign.
- Verification packages are not release-afterthoughts: interview and baseline collection start now; role/state/accessibility checks gate the affected releases.

● ORDERED BACKLOG / OVERVIEW

A build order the team can review.

Order is a proposed dependency sequence, not a calendar. Validation work starts alongside discovery.

BL-01	Restore keyboard access to conversation detail	P1	Effort S	CRM frontend + accessibility QA
BL-02	Define shared ownership, next-step and time contracts	P1	Effort M	Product owner + data/CRM engineering
BL-03	Create a reliable personal work queue	P1	Effort M	Product designer + CRM frontend/backend
BL-04	Expose owner and next step on pipeline cards	P1	Effort M	CRM designer + frontend
BL-05	Normalize conversation identity and timestamps	P1	Effort L	Integrations/data engineering + frontend
BL-06	Build an owned response queue	P1	Effort M	Sales operations + CRM engineering
BL-07	Make new deals and empty email states recoverable	P1	Effort M	Product designer + CRM engineering
BL-08	Clarify reporting populations and source coverage	P1	Effort L	Data engineering + product owner
BL-09	Turn call commitments into reviewed work	P1	Effort L	CRM/backend + designer + sales owner
BL-10	Create unified relationship context	P1	Effort L	CRM data/frontend + designer

Every package below includes linked findings, business rationale, scope, dependencies, owner role, acceptance and a measure. The editable CSV/JSON is the implementation handoff.

● ORDERED BACKLOG / OVERVIEW

A build order the team can review.

Order is a proposed dependency sequence, not a calendar. Validation work starts alongside discovery.

BL-11	Repair incomplete identity with provenance	P2	Effort M	Operations + integrations engineering
BL-12	Make outreach enrollment inspectable	P2	Effort M	Outreach engineering + operations
BL-13	Explain connection actions and sync exceptions	P2	Effort M	Integrations engineering + designer
BL-14	Provide keyboard-operable table resizing	P2	Effort M	Shared frontend component owner
BL-15	Clarify current stage state	P2	Effort S	Designer + frontend
BL-16	Validate operational roles and exceptional states	Verification	Effort M	QA + product owner + engineering
BL-17	Complete accessibility and assisted-use coverage	Verification	Effort M	Accessibility QA + frontend
BL-18	Collect user and behavioral evidence; rerank	Verification	Effort M	UX auditor + sales users + analytics owner
BL-19	Validate proposed navigation and key screens	Verification	Effort M	UX designer + users + product owner

Every package below includes linked findings, business rationale, scope, dependencies, owner role, acceptance and a measure. The editable CSV/JSON is the implementation handoff.

● BACKLOG CONTRACT / BL-01 · BL-02 · BL-03

P1 BL-01 Restore keyboard access to conversation detail

Effort S · AX-01

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
A core reading workflow has a pointer-only entry in the inspected list. Accessibility is an access requirement, not a cosmetic improvement.	None	Make the conversation title a named internal link. Preserve independent deal, bid and external platform links. Verify Tab and Enter.	From Inbox, keyboard-only users open the intended internal thread and return to its list position.
OWNER ROLE / MEASUREMENT: CRM frontend + accessibility QA / Keyboard task completion and failures			

P1 BL-02 Define shared ownership, next-step and time contracts

Effort M · UX-01, UX-02, UX-11, UX-16, UX-28, UX-29

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
Shared semantics prevent each surface from interpreting responsibility, dates and outcomes differently.	Owner interview + engineering data review	Agree deal/task/thread ownership; dated versus undated states; display timezone; metric cohort and missing-data rules. Record migration and source limitations.	One documented contract and representative examples cover all linked surfaces; unknown remains distinct from zero.
OWNER ROLE / MEASUREMENT: Product owner + data/CRM engineering / Cross-surface consistency checks			

P1 BL-03 Create a reliable personal work queue

Effort M · UX-10, UX-11, UX-12, UX-13, UX-14

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
Users need a dependable daily action list before adding more automation.	BL-02	My work, Today, Overdue, Undated; explicit status; global capture; plain due-date labels; bulk scheduling with confirmation.	A salesperson finds their next action, captures a task and schedules undated work without constructing a filter.
OWNER ROLE / MEASUREMENT: Product designer + CRM frontend/backend / Time to first action; undated task age			

Status: Proposed. Confirm actual frequency, constraints and effort with the owner and engineering before scheduling. Retest the affected connected screens, not just the changed component.

● BACKLOG CONTRACT / BL-04 · BL-05 · BL-06

P1 BL-04 Expose owner and next step on pipeline cards

Effort M · UX-01, UX-02, UX-04, UX-05

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
Managers need accountability and sales need the next move without opening every record.	BL-02; BL-03 supplies consistent task states	Owner / Unassigned, next task and explicit date; separate stage age and idle; concise title and source link; personal/risk views.	Card scan identifies owner, next action and date; URL titles stay compact; age and idle are understood.

OWNER ROLE / MEASUREMENT: CRM designer + frontend / Next-step coverage; scan task time

P1 BL-05 Normalize conversation identity and timestamps

Effort L · UX-15, UX-16, UX-18

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
A response queue is unreliable when identity and waiting time differ between surfaces.	BL-02; source identity/time review	Resolve linked contact identity with provenance; one timezone presentation; label counter units and populations.	Same thread has a consistent identity and message time in list and detail; count units are explicit.

OWNER ROLE / MEASUREMENT: Integrations/data engineering + frontend / Identity exceptions; timestamp mismatch count

P1 BL-06 Build an owned response queue

Effort M · UX-17, UX-19

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
The oldest unanswered conversation should have an accountable person and a deliberate reply path.	BL-05; BL-02 ownership rules	My replies, waiting age, owner and coverage exceptions; assignment and handoff; safe multi-line composition shortcut.	Users select their oldest unanswered thread and know its owner; Enter behavior is explicit and tested without live sending.

OWNER ROLE / MEASUREMENT: Sales operations + CRM engineering / First-response time; aged unanswered threads

Status: Proposed. Confirm actual frequency, constraints and effort with the owner and engineering before scheduling. Retest the affected connected screens, not just the changed component.

● BACKLOG CONTRACT / BL-07 · BL-08 · BL-09

P1

BL-07 Make new deals and empty email states recoverable

Effort M · UX-03, UX-06, UX-09

WHY THIS BELONGS HERE

Fast capture should lead to a usable handoff; empty history must explain its prerequisites.

DEPENDS ON

BL-02; contact matching review

IMPLEMENTATION SCOPE

Quick capture plus Finish setup; stage readiness; link contact before correspondence; explain mailbox, no-history and unmatched states.

DONE WHEN

A deal becomes ready with owner/contact/next step; an empty email state offers a relevant recovery route.

OWNER ROLE / MEASUREMENT: Product designer + CRM engineering / Creation-to-ready time; recovery task success

P1

BL-08 Clarify reporting populations and source coverage

Effort L · UX-28, UX-29, UX-30

WHY THIS BELONGS HERE

A manager must know whether a comparison is valid before acting on it.

DEPENDS ON

BL-02; event/source reconciliation

IMPLEMENTATION SCOPE

Shared period/cohort control; inclusion rules and business definitions; distinguish zero, unknown and incomplete; drill-through.

DONE WHEN

A metric can be traced to eligible source records, denominator and period; unknown coverage is not rendered as a trustworthy zero.

OWNER ROLE / MEASUREMENT: Data engineering + product owner / Reconciliation error; interpretation accuracy

P1

BL-09 Turn call commitments into reviewed work

Effort L · UX-24, UX-25, UX-26

WHY THIS BELONGS HERE

The call-to-task handoff connects existing intelligence to execution.

DEPENDS ON

BL-03; source-to-summary accuracy check

IMPLEMENTATION SCOPE

Review action items with timestamp/source; accept/dismiss; owner/date; detect duplicate tasks; create reviewed email draft.

DONE WHEN

Each candidate has a disposition; accepted items create linked tasks once; drafts remain reviewable and are not auto-sent.

OWNER ROLE / MEASUREMENT: CRM/backend + designer + sales owner / Reviewed action conversion; call-to-task time

Status: Proposed. Confirm actual frequency, constraints and effort with the owner and engineering before scheduling. Retest the affected connected screens, not just the changed component.

● BACKLOG CONTRACT / BL-10 · BL-11 · BL-12

P1 BL-10 Create unified relationship context

Effort L · UX-20, UX-07

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
Call preparation and handoff depend on understanding the latest interaction and open commitments.	BL-05; BL-09; activity-source mapping	Unified chronological activity and open work; actor, source and previous/new stage in events; keep detail tabs for deeper work.	A user prepares for a contact and explains who changed the deal without reconstructing history across tools.
OWNER ROLE / MEASUREMENT: CRM data/frontend + designer / Preparation time; handoff accuracy			

P2 BL-11 Repair incomplete identity with provenance

Effort M · UX-21, UX-22, UX-23

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
Imported identity and inferred local time need a clear repair path before reuse.	BL-05 identity rules	Needs review queue; duplicate review; original source fields; explicit local-time source/confidence; consistent CRM membership actions.	Users repair the intended record and understand timezone confidence; imported data is not silently overwritten.
OWNER ROLE / MEASUREMENT: Operations + integrations engineering / Incomplete record age; duplicate review success			

P2 BL-12 Make outreach enrollment inspectable

Effort M · UX-27

WHY THIS BELONGS HERE	DEPENDS ON	IMPLEMENTATION SCOPE	DONE WHEN
Aggregate enrollment counts do not explain an individual recipient state.	Sequence engine state mapping	Recipient roster with eligible/queued/sent/blocked/skipped reasons; next action; link each count to its population.	Users explain why an enrolled recipient has no queued email using visible evidence.
OWNER ROLE / MEASUREMENT: Outreach engineering + operations / Recipient diagnosis time			

Status: Proposed. Confirm actual frequency, constraints and effort with the owner and engineering before scheduling. Retest the affected connected screens, not just the changed component.

● BACKLOG CONTRACT / BL-13 · BL-14 · BL-15

P2

BL-13 Explain connection actions and sync exceptions

Effort M · UX-31, UX-32

WHY THIS BELONGS HERE

Admins need predictable history handling and recoverable import diagnostics.

DEPENDS ON

Provider/API behavior verification

IMPLEMENTATION SCOPE

Precise retained/deleted history guidance; confirm action effects; sync ranges/counts/exclusions; missing-call diagnosis.

DONE WHEN

An admin predicts effects without removing an account and locates an import exception in a read-only log.

OWNER ROLE / MEASUREMENT: Integrations engineering + designer / Diagnosis time; action comprehension

P2

BL-14 Provide keyboard-operable table resizing

Effort M · AX-02

WHY THIS BELONGS HERE

Dense tables should support the same adjustment through keyboard and pointer input.

DEPENDS ON

Inventory shared table component + alternate sizing paths

IMPLEMENTATION SCOPE

Focusable named separators or keyboard-accessible column-width controls; current value; arrow-key adjustment and reset.

DONE WHEN

A keyboard user changes and restores a column width; screen-reader label/value is meaningful.

OWNER ROLE / MEASUREMENT: Shared frontend component owner / Keyboard resize completion

P2

BL-15 Clarify current stage state

Effort S · UX-08

WHY THIS BELONGS HERE

Current state needs to stand out without depending on color alone.

DEPENDS ON

BL-04 + BL-07

IMPLEMENTATION SCOPE

Distinct current/completed stage markers; explicit text state; verify contrast and accessible state labels.

DONE WHEN

Users recognize current stage accurately using text/state as well as visual styling.

OWNER ROLE / MEASUREMENT: Designer + frontend / Stage identification accuracy

Status: Proposed. Confirm actual frequency, constraints and effort with the owner and engineering before scheduling. Retest the affected connected screens, not just the changed component.

● BACKLOG CONTRACT / BL-16 · BL-17

Verification

BL-16 Validate operational roles and exceptional states

Effort M · CHECK-ROLES, CHECK-STATES

WHY THIS BELONGS HERE

The admin session cannot establish restricted-role behavior or recovery from failure.

DEPENDS ON

Representative role accounts + test fixtures

IMPLEMENTATION SCOPE

Sales/manager/admin read-write boundaries, unassigned handoff, empty/loading/failed/permission states, unsaved drafts and recoverable errors.

DONE WHEN

Coverage matrix has observed outcomes per role/state; unsafe scenarios stay in test fixtures.

OWNER ROLE / MEASUREMENT: QA + product owner + engineering / Role/state pass and failure log

Verification

BL-17 Complete accessibility and assisted-use coverage

Effort M · CHECK-A11Y

WHY THIS BELONGS HERE

Selected passing controls do not establish product-wide WCAG conformance.

DEPENDS ON

BL-01 + BL-14; representative test data

IMPLEMENTATION SCOPE

VoiceOver/browser task path; focus visibility/obscuring; desktop text resize/reflow; critical contrast incl. state colors; target spacing; announcements/errors.

DONE WHEN

Each selected criterion has a method, outcome and evidence; failures become linked issues and are retested.

OWNER ROLE / MEASUREMENT: Accessibility QA + frontend / Task completion with assistive technology

Status: Proposed. Confirm actual frequency, constraints and effort with the owner and engineering before scheduling. Retest the affected connected screens, not just the changed component.

● BACKLOG CONTRACT / BL-18 · BL-19

Verification

BL-18 Collect user and behavioral evidence; rerank

Effort M · CHECK-RESEARCH

WHY THIS BELONGS HERE

Actual frequency and operational cost can change the provisional order.

DEPENDS ON

Owner-user answers; other real users if available; analytics export

IMPLEMENTATION SCOPE

One owner/user interview now; independent users later; synthetic-role tasks kept separate; analyze events/support; baseline comparable tasks.

DONE WHEN

Quotes are traceable to actual people; synthetic scenarios carry no participant counts; priority rationale reflects supplied evidence.

OWNER ROLE / MEASUREMENT: UX auditor + sales users + analytics owner / Frequency, time, workaround and consequence

Verification

BL-19 Validate proposed navigation and key screens

Effort M · CHECK-WIREFRAMES

WHY THIS BELONGS HERE

Concepts demonstrate the direction; task results determine whether the direction works.

DEPENDS ON

BL-18 context; BL-03/04/06/09 design decisions

IMPLEMENTATION SCOPE

Test navigation plus My work, Deal workspace and response queue wireframes; document revisions and engineering constraints.

DONE WHEN

Users finish representative tasks without guidance; accepted concepts have decision notes and implementation scope.

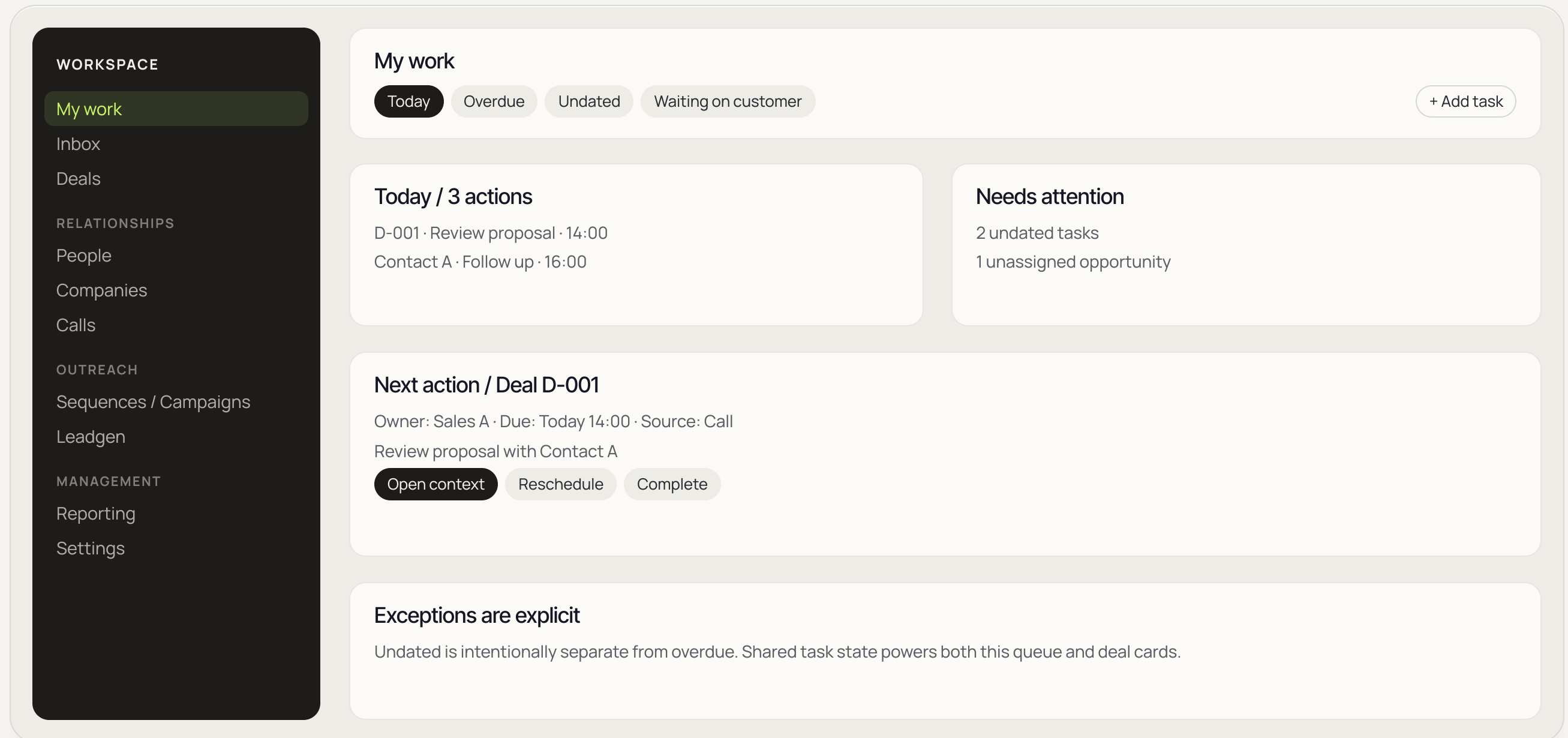
OWNER ROLE / MEASUREMENT: UX designer + users + product owner / Task completion; critical errors; comprehension

Status: Proposed. Confirm actual frequency, constraints and effort with the owner and engineering before scheduling. Retest the affected connected screens, not just the changed component.

● PROPOSED WIREFRAME

My work: bring exceptions into the daily queue.

Concept for validation / not implemented / synthetic records. New navigation groups tasks by purpose.

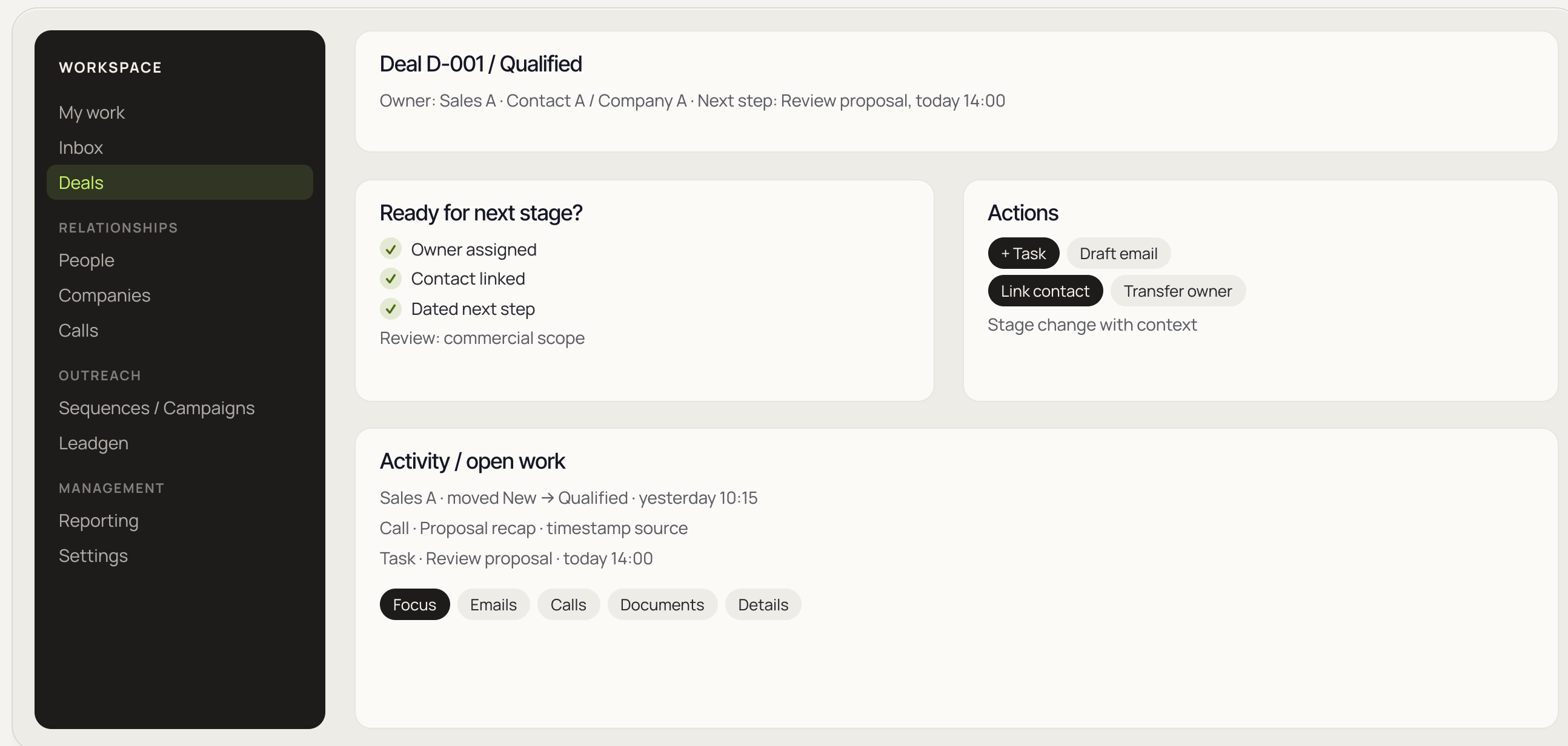


Validates UX-01, 02, 10, 11, 14. Test: find the next action, schedule an undated item and capture new work. Preserve fast capture and make its missing context visible.

● PROPOSED WIREFRAME

Deal workspace: readiness before empty metadata.

Concept for validation / not implemented / synthetic content. Users should see responsibility and prerequisites together.



Validates UX-03, 06, 07, 08, 09, 20, 24. Test: explain readiness, find latest commitment, then hand off. Secondary details remain available; current stage uses text and state.

● PROPOSED WIREFRAME

Reply operations: identity, waiting age and ownership.

Concept for validation / not implemented / synthetic content. Conversation titles are keyboard-operable internal links.

WORKSPACE

My work

Inbox

Deals

RELATIONSHIPS

People

Companies

Calls

OUTREACH

Sequences / Campaigns

Leadgen

MANAGEMENT

Reporting

Settings

Inbox / My replies

Oldest unanswered

All

Unassigned

Timezone: user setting

Queue

Contact A · Sales A · waiting 4 h

Company A · Linked deal D-001

Contact B · Unassigned · waiting 2 h

Needs assignment

Counts state their population.

Conversation / Contact A

Linked person + identity source

Same displayed time as list

Reply draft ...

Enter: new line · Explicit Send

Context and handoff

Profile

Open work

Activity

Assign owner / Schedule next step. Draft review and sending remain deliberate actions.

Validates UX-15 to 19 and AX-01. Test: identify the oldest owned unanswered thread, open it by keyboard, check identity/time and prepare a multi-line draft.

● SOURCES & NEXT DECISION

Review evidence, then refine the work order.

Next input: the owner-user's real episodes and priorities. This edition remains explicit about research and coverage still pending.

ANODA / UX Audit service

Live scope, deliverables and FAQ verified in the browser.

W3C / Contrast Minimum, 1.4.3

Normal text: at least 4.5:1; selected task text sample approximately 5.74:1.

www.w3.org/WAI/WCAG22/Understanding/contrast-minimum.html

W3C / WCAG 2.2 Keyboard, 2.1.1

Pointer operations need a keyboard-equivalent path; an equivalent control can satisfy the criterion.

www.w3.org/WAI/WCAG22/Understanding/keyboard.html

W3C / Bypass Blocks, 2.4.1

Evaluate bypass mechanisms; do not classify absent skip links as failure without considering alternatives.

www.w3.org/WAI/WCAG22/Understanding/bypass-blocks.html

Public screenshots retain placeholder content. New wireframes contain synthetic records only. No live CRM data, permissions, messages or provider connections were changed for this extension.

Observation confidence is separate from unmeasured business risk. Effort is an initial design scope: S / M / L.

Pipeline – decision-ready issue cards

P1 ux-01 Ownership is hidden from the board

Severity 3 · Confidence High · Effort M · E01 / E02

OBSERVED

Cards omit the owner; Display settings offers Company, Value and Age, but no Owner card field. An inspected deal is Unassigned.

BUSINESS RISK

A sales lead cannot assign accountability while scanning the pipeline. Unowned opportunities may remain unattended.

RECOMMENDED

Expose owner avatars and Unassigned on cards. Add My deals and Unassigned views, with an assign action.

DONE WHEN

A manager can identify and assign an unowned deal without opening its detail page.

MEASUREMENT FOCUS: Unassigned active deals; time to assign an owner.

P1 ux-02 Planned does not reveal the next action

Severity 3 · Confidence High · Effort M · E01

OBSERVED

Cards show Planned or Tuesday without the task title or an explicit date. A No activity label is visible but does not explain the missing next step.

BUSINESS RISK

The board reports state without helping the salesperson decide what to do next.

RECOMMENDED

Show next task, due date and responsible person. Separate No next step, Undated task and Overdue.

DONE WHEN

Users can explain the next action and its deadline directly from each card.

MEASUREMENT FOCUS: Active deals with a dated next step; next-step identification time.

P1 ux-03 Deal creation captures a name only

Severity 3 · Confidence High · Effort M · E03

OBSERVED

The New deal modal contains a single Deal name field. Contact, owner and next action are absent from this entry surface.

BUSINESS RISK

Fast capture can create context-poor records that need manual cleanup before a handoff.

RECOMMENDED

Keep quick capture, with owner default, contact link and optional next-step date. Offer a clear Finish setup checklist after creation.

DONE WHEN

A new deal can be handed off with owner, contact and next step; quick capture remains available.

MEASUREMENT FOCUS: Creation-to-ready time; new deals missing ownership or contact.

P2 ux-04 Age and inactivity compete for interpretation

Severity 2 · Confidence High · Effort S · E01

OBSERVED

Cards use an hourglass age plus, on some cards, a flame inactivity age. Both use short day values.

BUSINESS RISK

Users may confuse time in the pipeline with time since the last meaningful activity.

RECOMMENDED

Label Stage age and Idle, explain thresholds on hover, and offer an At risk preset.

DONE WHEN

Users distinguish stage age from inactivity and know why a warning is shown.

MEASUREMENT FOCUS: Correct interpretation in a task test; risk-view usage.

P2 ux-05 Unbounded deal names make cards uneven

Severity 2 · Confidence High · Effort S · L01

OBSERVED

A live card title includes a long source URL, producing a much taller card than surrounding opportunities.

BUSINESS RISK

Variable card height slows scanning and makes low-quality imported names dominate the pipeline.

RECOMMENDED

Use a concise display title, two-line truncation and a separate source-link field. Keep the full title accessible.

DONE WHEN

Long titles and URLs do not expand cards beyond the agreed layout; source remains available.

MEASUREMENT FOCUS: Time to find a target deal; records with URL-like names.

Deal workspace – decision-ready issue cards

P2 ux-06 Metadata outweighs sales readiness

Severity 2 · Confidence High · Effort M · E04

OBSERVED

Deal, Scope and Legal & billing groups display many empty values. Contact linkage and commercial readiness have no consolidated setup summary.

BUSINESS RISK

Users must inspect individual fields to understand whether a deal is ready for the next stage.

RECOMMENDED

Add a compact stage-specific readiness block. Prioritize owner, contact, next step and commercial context; collapse secondary empty fields.

DONE WHEN

Users identify what is missing for a stage transition from one summary.

MEASUREMENT FOCUS: Preparation time; completeness of stage-required fields.

P2 ux-07 Timeline events lack audit context

Severity 2 · Confidence High · Effort M · E04

OBSERVED

The Focus timeline shows a generic Task event and Moved to Qualified without an actor or previous stage.

BUSINESS RISK

Handoffs require extra checking to understand who changed a record and what happened.

RECOMMENDED

Use explicit verbs, actor, source, old/new stage and a link to the referenced task.

DONE WHEN

A reviewer can explain who did what, when and through which source from the event.

MEASUREMENT FOCUS: Handoff comprehension accuracy; clicks to resolve event context.

P2 ux-08 Stage progress does not clearly separate current from complete

Severity 2 · Confidence High · Effort S · E04

OBSERVED

New conversation and the current Qualified segment both appear green; the current segment embeds an age label.

BUSINESS RISK

Users must read the text to determine the active stage rather than recognize it immediately.

RECOMMENDED

Use a distinct current-stage treatment, completed-state marker and explicit Stage age label.

DONE WHEN

Users identify the current stage at a glance without relying on color alone.

MEASUREMENT FOCUS: Stage-recognition accuracy and time.

P1 ux-09 Email empty state hides prerequisites

Severity 3 · Confidence High · Effort M · E05 / E06

OBSERVED

An inspected deal has no linked People and displays No emails logged with Write an email. The composer opens with an empty recipient.

BUSINESS RISK

Users cannot tell whether there is no history, missing contact matching, or a connection issue.

RECOMMENDED

Explain the current state and offer Link a contact, Check mailbox and Compose with recipient selection as appropriate.

DONE WHEN

Each empty state explains why it is empty and offers a relevant recovery action. Do not imply missing emails without a confirmed match.

MEASUREMENT FOCUS: Time to reach correct correspondence; empty-state recovery completion.

Task execution – decision-ready issue cards

P1 ux-10 Daily work requires manual filter construction

Severity 3 · Confidence High · Effort M · E07

OBSERVED

The task list offers All, Overdue, Open, Client tasks and Archived. The filter opens an advanced builder; no My tasks, Today or Undated preset is visible.

BUSINESS RISK

A daily work queue is harder to assemble than a broad record inventory.

RECOMMENDED

Add My work, Today, Overdue and Undated views with saved defaults and visible owner/date filters.

DONE WHEN

A salesperson opens their actionable queue without building an advanced filter.

MEASUREMENT FOCUS: Time to first actionable task; daily queue adoption.

P1 ux-11 Undated work is not a first-class exception

Severity 3 · Confidence High · Effort M · E04 / E07

OBSERVED

Multiple open tasks display Set date. The deal Focus task also has No date; undated work has no dedicated task preset.

BUSINESS RISK

Work can remain open indefinitely without becoming overdue or entering a dated queue.

RECOMMENDED

Provide an Undated exception view, a bulk schedule flow and due-date guidance at task creation.

DONE WHEN

Undated tasks are visible, assignable and schedulable; a date can remain intentionally optional.

MEASUREMENT FOCUS: Undated open tasks; median time from creation to scheduling.

FINDING REGISTER / TASK EXECUTION

P2 ux-12 Open tasks display an empty Status column

Severity 2 · Confidence High · Effort S · E07

OBSERVED

The Open list shows a dash in the Status column for inspected rows, alongside completion checkboxes.

BUSINESS RISK

Users cannot distinguish missing status from an implicit open state.

RECOMMENDED

Render an explicit status or remove the redundant column from the default view. Distinguish selection from completion controls.

DONE WHEN

Every row communicates status consistently; controls have clear, separate labels.

MEASUREMENT FOCUS: Status interpretation accuracy; accidental completion rate.

P3 ux-13 Deadline controls use internal shorthand

Severity 1 · Confidence High · Effort S · E04

OBSERVED

The task composer labels its date controls DDL and offers By Fri.

BUSINESS RISK

New users need to infer the meaning and exact date of a shortcut.

RECOMMENDED

Replace DDL with Due date; show the actual date beside relative shortcuts.

DONE WHEN

Date controls use plain language and unambiguous dates.

MEASUREMENT FOCUS: First-use comprehension of date controls.

P2 ux-14 Global task capture is not visible

Severity 2 · Confidence Medium · Effort M · E07

OBSERVED

The inspected global Tasks page has view, column, sort and filter controls, but no visible Add task action.

BUSINESS RISK

A user who starts from their work queue must find another record surface to capture work.

RECOMMENDED

Add a global task composer with record, owner and due-date selection.

DONE WHEN

A task can be captured and associated with a record from the task queue.

MEASUREMENT FOCUS: Time to capture a task from the global work view.

Communication – decision-ready issue cards

P1 ux-15 Known contacts still appear as Unknown

Severity 3 · Confidence High · Effort M · E08 / E09

OBSERVED

A thread header and list row show Unknown while its Profile links to a named person. The message area calls the sender Lead.

BUSINESS RISK

The salesperson must inspect a secondary panel to recognize the conversation.

RECOMMENDED

Resolve identity from linked records with source attribution. Use meaningful fallbacks when platform identity is unavailable.

DONE WHEN

The list, header, profile and message sender present consistent identities or explain why they differ.

MEASUREMENT FOCUS: Unknown threads with linked contacts; conversation recognition time.

P1 ux-16 Message time changes between list and detail

Severity 3 · Confidence High · Effort L · E08 / E09; L02

OBSERVED

For one single-message conversation, the list shows 29 Sep 17:25 and detail shows 29 Sept 20:25. Neither display labels a timezone.

BUSINESS RISK

Users may misjudge response timing and cannot reliably compare recency across surfaces.

RECOMMENDED

Normalize timestamps to the selected user timezone and expose the timezone on hover or in preferences.

DONE WHEN

The same message renders the same instant consistently in list, detail and exports.

MEASUREMENT FOCUS: Cross-surface timestamp mismatches; response-age accuracy.

P1 ux-17 Needs reply does not form an accountable response queue

Severity 3 · Confidence High · Effort M · E08

OBSERVED

The Inbox table shows status and last activity, but no visible owner, waiting duration or response deadline. The visible sort is Last activity.

BUSINESS RISK

New activity may compete with older unanswered conversations; team accountability is not visible in the queue.

RECOMMENDED

Add owner, waiting since and response-age filters. Provide Oldest unanswered and My replies views.

DONE WHEN

A team member identifies their oldest unanswered conversation and the reason it is urgent.

MEASUREMENT FOCUS: Median and upper-percentile first-response time; unanswered threads beyond the agreed threshold.

FINDING REGISTER / COMMUNICATION

P2 ux-18 Inbox counters use different units without explanation

Severity 2 · Confidence High · Effort S · E08 / E09

OBSERVED

The sidebar badge, conversation count and Needs reply count differ. The sidebar also expands multiple account counters.

BUSINESS RISK

Users cannot immediately tell whether a badge counts messages, conversations, or actionable replies.

RECOMMENDED

Name each unit, use the actionable count for the main badge and move account breakdowns into a contextual filter.

DONE WHEN

Users can explain every count; navigation retains stable access to the rest of CRM.

MEASUREMENT FOCUS: Counter comprehension; time to reach another module from Inbox.

P2 ux-19 Enter sends a message instead of adding a line

Severity 2 · Confidence High · Effort S · E09

OBSERVED

The thread composer explicitly says Enter to send, Shift+Enter for a new line.

BUSINESS RISK

Users writing a multi-line reply may send an unfinished message. No accidental send was triggered in this audit.

RECOMMENDED

Use Enter for a new line and Ctrl/Cmd+Enter to send, or expose a clearly visible preference. Retain a clear Send action.

DONE WHEN

Multi-line composition does not accidentally send; the send shortcut is discoverable.

MEASUREMENT FOCUS: Accidental-send reports; message corrections immediately after sending.

P2 ux-27 Sequence enrollments are summarized but not inspectable here

Severity 2 · Confidence Medium · Effort M · L06

OBSERVED

An active sequence shows Enrolled 2, Queued 0 and Sent 0, with Flow, Queue and Sent tabs. No enrolled-recipient view is visible on the inspected screen.

BUSINESS RISK

A user cannot explain each recipient outcome from the aggregate summary alone. Zero sent does not prove sending is broken.

RECOMMENDED

Add an enrollment roster with current step, eligibility, next action and pause/stop reason.

DONE WHEN

Each enrolled recipient has an inspectable state and an explanation when no step is queued.

MEASUREMENT FOCUS: Time to explain an enrollment; unresolved enrollment exceptions.

Records – decision-ready issue cards

P1

ux-20

Contact preparation lacks a unified history view

Severity 3 · Confidence Medium · Effort M · E10

OBSERVED

The inspected person opens to an empty Notes tab with Tasks, Emails and Notifications separate. No unified activity or Calls tab is visible.

BUSINESS RISK

Call preparation and relationship handoff require piecing together several sources.

RECOMMENDED

Add a unified activity feed with emails, calls, tasks and deal events; retain filtered tabs for focused work.

DONE WHEN

Users can summarize the latest interaction and next step from one contact view.

MEASUREMENT FOCUS: Contact preparation time; handoff recall accuracy.

P2

ux-21

Imported records need a repair workflow

Severity 2 · Confidence High · Effort M · E10; L03

OBSERVED

The People list includes Unnamed and an invalid-import label. The inspected unnamed person already has an email and linked company.

BUSINESS RISK

Incomplete identity makes records harder to search, recognize and use in communications.

RECOMMENDED

Create a Needs review view for missing names, suspicious imported values and incomplete links; support controlled merge and correction.

DONE WHEN

Users can find and repair incomplete records without scanning the full database.

MEASUREMENT FOCUS: Incomplete identity count; repair time; duplicate candidates resolved.

P2

ux-22

Local time depends on an unexplained tracking inference

Severity 2 · Confidence High · Effort S · E10

OBSERVED

The contact field says Unknown – set when they open a tracked email. No confidence or provenance is visible here.

BUSINESS RISK

Users may treat an inferred timezone as reliable scheduling information.

RECOMMENDED

Allow explicit timezone entry and distinguish declared, inferred and unknown values with source and confidence.

DONE WHEN

Timezone provenance is visible and an inferred value can be corrected.

MEASUREMENT FOCUS: Contacts with confirmed timezone; scheduling corrections.

P3 UX-23 In CRM mixes state and action labels

Severity 1 · Confidence High · Effort S · L04

OBSERVED

The LinkedIn Leads table has an In CRM column showing New for some records and Open person links for others.

BUSINESS RISK

New can be mistaken for a sales stage instead of a CRM membership state.

RECOMMENDED

Use Not added / In CRM states and a separate Add / Open action.

DONE WHEN

The membership state is clear without clicking or inferring action wording.

MEASUREMENT FOCUS: Correct interpretation of CRM membership.

Call intelligence – decision-ready issue cards

P1 UX-24 Call commitments are not reconciled with tasks

Severity 3 · Confidence High · Effort M · E11; L05

OBSERVED

The inspected call summary and follow-up contain concrete next steps, while Related tasks shows None for both ANODA and Client tasks.

BUSINESS RISK

Recorded commitments may stay in prose instead of entering an accountable work queue. The underlying extraction cause is unverified.

RECOMMENDED

Add a Review action items flow that proposes tasks, asks for owner/date, links accepted items and explains rejected or unresolved items.

DONE WHEN

Every proposed action item is accepted into a task, dismissed with a reason, or clearly left unresolved.

MEASUREMENT FOCUS: Calls with reviewed action items; accepted items with owner and date.

P2 UX-25 Structured insights lack local provenance

Severity 2 · Confidence High · Effort M · E11; L05

OBSERVED

Summary passages link to recording timestamps. Structured Insights list extracted statements without matching source links or review status.

BUSINESS RISK

Users cannot verify a specific extracted claim as easily as a summary passage.

RECOMMENDED

Attach transcript timestamp, generation source and review state to structured insights; allow correction.

DONE WHEN

A user can verify each insight against its source and identify reviewed content.

MEASUREMENT FOCUS: Insight verification time; corrected or rejected insights.

P2 ux-26 Follow-up ends at Copy

Severity 2 · Confidence High · Effort M · E11

OBSERVED

The inspected call detail exposes a generated Follow-up and Copy action, without a visible draft/send handoff or sent state.

BUSINESS RISK

The user must move content into another workflow and remember whether it was used.

RECOMMENDED

Provide Create email draft linked to the deal/contact, explicit review before send and visible draft/sent status.

DONE WHEN

A reviewed draft can be created without copying between tools; sending remains deliberate.

MEASUREMENT FOCUS: Call-to-draft time; reviewed follow-ups with a recorded outcome.

Reporting – decision-ready issue cards

P1 ux-28 Adjacent metrics use different cohorts

Severity 3 · Confidence High · Effort M · E12

OBSERVED

Stats mixes 7/30-day headline counts with a 90-day reply table; invite and irrelevant-bid exclusions differ between sections. Explanations exist in prose.

BUSINESS RISK

A manager can compare numbers that describe different populations and draw a misleading conclusion.

RECOMMENDED

Use one visible time-window control and explicit inclusion chips per metric. Separate differing cohorts into named sections.

DONE WHEN

Users identify the timeframe and denominator before comparing two metrics.

MEASUREMENT FOCUS: Correct cohort interpretation; decisions needing manual reconciliation.

P1 ux-29 Funnel zeros do not reveal tracking coverage

Severity 3 · Confidence Medium · Effort L · L07

OBSERVED

Dashboard shows zero Interview and Hired values. It defines these stages, but does not display whether their event sources are complete or connected to CRM outcomes.

BUSINESS RISK

A true zero and missing event coverage are difficult to distinguish; the audit does not establish which applies.

RECOMMENDED

Expose source coverage and freshness. Use Unknown/incomplete when coverage is not validated; provide drill-through to underlying records.

DONE WHEN

Every funnel stage has a source, coverage state and inspectable population.

MEASUREMENT FOCUS: Stages with validated coverage; reconciliation against linked calls and won deals.

P3 ux-30 Metric definitions expose storage terminology

Severity 1 · Confidence High · Effort S · E12; L07

OBSERVED

Stats and Dashboard definitions name internal tables and the database engine.

BUSINESS RISK

Implementation terms make business definitions harder to read for users unfamiliar with the data model.

RECOMMENDED

Use business language such as All recorded bids; place technical details in a secondary methodology panel.

DONE WHEN

A manager understands the metric definition without knowing database names.

MEASUREMENT FOCUS: Definition comprehension during a reporting task.

Integrations – decision-ready issue cards

P2 ux-31 Remove has no visible data-impact explanation

Severity 2 · Confidence High · Effort S · E13

OBSERVED

Fathom settings explains Make inactive preserves calls, but the account row exposes Remove without a nearby explanation of historical-data handling.

BUSINESS RISK

Administrators cannot choose confidently between stopping sync and removing a connection. No deletion behavior was tested.

RECOMMENDED

Explain effects beside the action and in confirmation, including retained history, future sync, reversibility and affected records.

DONE WHEN

An administrator can predict the effect before any removal is committed.

MEASUREMENT FOCUS: Correct action selection in an admin task; support questions about removal.

P2 ux-32 Sync freshness lacks a reconciliation view

Severity 2 · Confidence High · Effort M · E13

OBSERVED

The account displays Active and synced 26m ago with Backfill, but no imported count, last successful range or unresolved-import summary on this surface.

BUSINESS RISK

When a call is missing, freshness alone does not help users distinguish delay, exclusion and failure.

RECOMMENDED

Provide a read-only sync log with last successful range, counts, exclusions and recoverable errors; link to missing-call review.

DONE WHEN

An administrator can explain whether an expected call was imported or why it was excluded.

MEASUREMENT FOCUS: Time to diagnose a missing call; unresolved sync exceptions.

EVIDENCE LEDGER

Traceable observations, safe public illustrations.

E identifiers refer to anonymized UI reproductions in this report. L identifiers refer to live observations described in the register.

E01 / E02	Deal board / display settings	UX-01, 02, 04; E02 reviewed, not illustrated
E03	New deal modal	UX-03
E04	Deal Focus and timeline	UX-06, 07, 08, 11, 13
E05 / E06	Deal Emails / composer	UX-09; E06 reviewed, not illustrated
E07	Global Tasks / Open	UX-10, 11, 12, 14
E08 / E09	Inbox list / single-message thread	UX-15, 16, 17, 18, 19
E10	Person detail	UX-20, 21, 22
E11	Call detail, summary, related tasks, follow-up	UX-24, 25, 26
E12	Stats	UX-28, 30
E13	Fathom connections	UX-31, 32
L01 / L03	Long-title board card / People list	UX-05 / UX-21
L02 / L04	Timestamp comparison / LinkedIn Leads	UX-16 / UX-23
L05 / L06 / L07	Call full content / sequence detail / Dashboard	UX-24, 25 / UX-27 / UX-29

ANONYMIZATION

Names, companies, identifiers, emails, messages, notes, call content and monetary amounts were replaced locally. Screens are re-rendered from observed DOM with normalized typography; placeholder lengths can alter wrapping. Layout defects introduced by sanitization are not audit findings.

● SOURCES & INTERPRETATION

Evidence first. Recommendations ready to validate.

A public sample can demonstrate the quality of an audit without exposing customer records or claiming unmeasured losses.

PRIMARY PRODUCT EVIDENCE

Current authenticated ANODA CRM desktop UI, observed on 01 October 2026. Public illustrations use synthetic record content. Findings are scoped to the inspected surfaces and current state.

EVALUATION REFERENCES

Jakob Nielsen / Nielsen Norman Group: 10 Usability Heuristics for User Interface Design. Used as a broad lens for visibility, consistency, error prevention, recognition and workflow efficiency.

[nngroup.com / Ten usability heuristics](https://nngroup.com/articles/ten-usability-heuristics/)

Jakob Nielsen / Nielsen Norman Group: Severity Ratings for Usability Problems. Frequency, impact and persistence inform the proposed ranking. Actual frequency and financial impact were not measured. A second reviewer and user testing should validate the severity assessment.

[nngroup.com / Severity ratings](https://nngroup.com/articles/severity-ratings/)

A useful audit ends with a better next decision.

Method: Every finding links evidence, priority, business risk, a change, a done-when check and a measure.

Next: Confirm the 14 P1 findings with real users, then start with keyboard access and shared ownership rules.

● LET'S TALK ABOUT YOUR PRODUCT

Turn findings into a clear next step.

Tell us what your product does, where users struggle and what your team needs to decide. We can help scope a UX audit, explore the evidence and plan the next stage of design.

Start with what your team **needs to decide.**

Discuss your product →

Explore our work →

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