Recommendations – cross sell testing

Usability Testing: Lean Report

Severin Rupprechter &
Toby Carpenter

14th September 2022
V1

Contents

Objectives

General objectives:

- To gauge customer enthusiasm for having a cross sell feature.
- To gauge reaction for our proposed cross sell solutions.
- To gauge reaction for our 'helpful' basket feature (over/under quantity & item not available by date required).

Scenario 1 (A+B) objectives:

- If category-based suggestions (1A) are better perceived than a more traditional way of presenting recommendations (1B).
- If replacing products at the basket level is well perceived and understood.

Scenario 2 objectives:

- If basket suggestions are beneficial to the user.
- If suggestions to *increase* the quantity of products to match the context of the basket is understood and useful to the user.
- If suggestions to *decrease* the quantity of products to match the context of the basket is understood and useful to the user.

Methodology
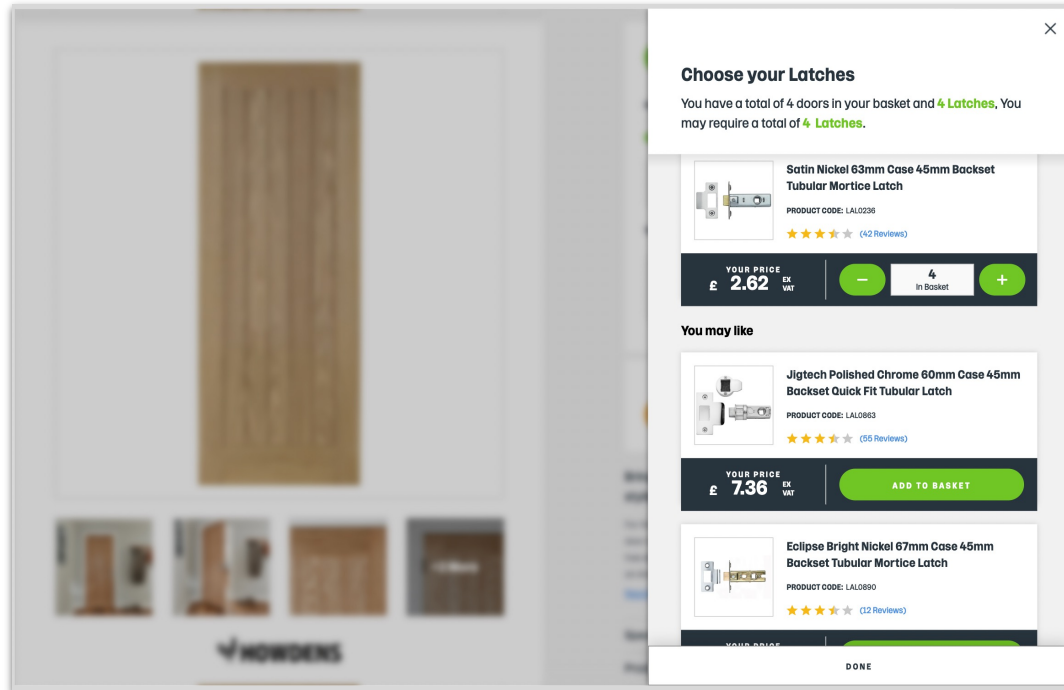
Scenario 1A

Approach: 1 to 1 remote moderated testing using Zoom to screenshare. Participants carried out the tasks using a think-aloud protocol.

Duration: Each session lasted up to 60 minutes.

Test materials: 1 x interactive Axure prototypes.

- Prototype link: https://91o9jd.axshare.com
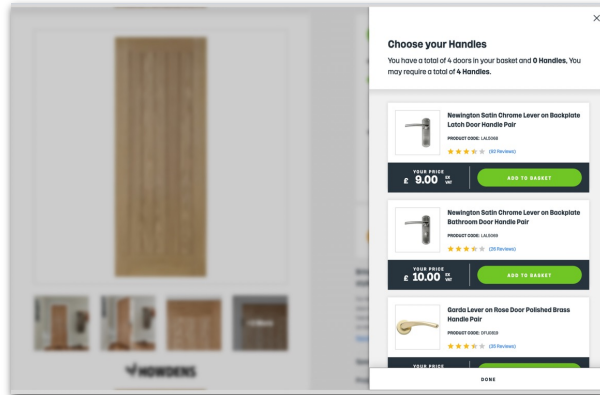
- 3 scenarios

Device: Desktop/laptop computers.

Participants: 9 participants (plus 2 reserves) were selected from Howdens' customer base. See appendix for full details.

Tasks: Each participant carried out a series of tasks on the prototypes (see discussion guide for task details).
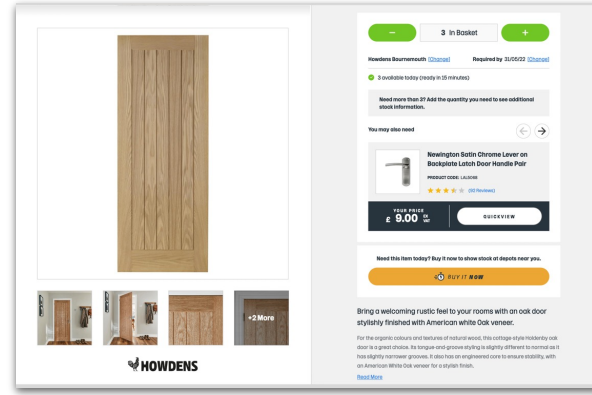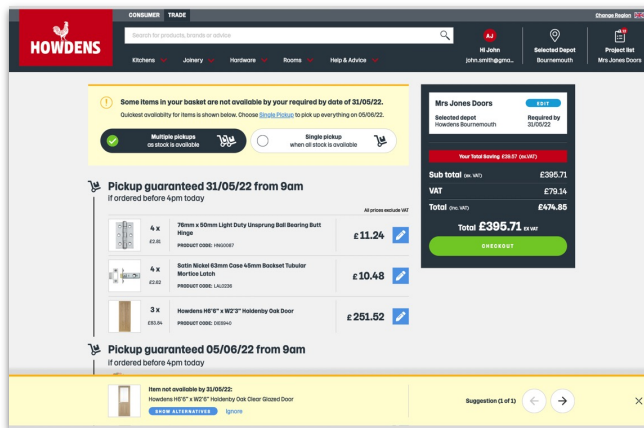
Key findings

Overall sentiment towards the recommendations was good and participants had a positive experience

Scenario 1A

Scenario 1B

Scenario 2

GOOD: All participants liked Howdens' approach of implementing recommendations to remind users of items that might have been missed. All mentioned that this was not the average "salesy" up-sell or cross-sell technique they are used to.

Almost all participants preferred option 1A over 1B, due to the following:

- 1A informed users how many handles, latches and hinges they need for their doors.

- However, majority of participants did not see the paragraph straight away, as the attention went straight to the items. Once discovered, it was found to be a useful and important feature.

- The majority of participants did not like the carousel in version 1B, because it was not clear how many items you had to scroll through and there were usually more clicks involved to find the product they were looking for.

All participants understood and liked the suggestions in scenario 2.

- However, the yellow banner at the bottom of the basket was not discovered straight away by the majority of participants. Some thought it looked like a banner or an ad, hence it was often overlooked or ignored first.

- Once the recommendation banner was discovered it became a useful feature for all participants.

ISSUE: The majority of participants did not see the recommendation box in the checkout page in scenario 1A.

Comments on the overall experience

> " The recommendations were useful, because I have a terrible memory (…) it gives you a little reminder that you might not forget something.
>
> Participant 1

> " I think it's definitely something that I would appreciate whenever it's rolled out!
>
> Participant 2

> " Yes, I would use it, as it is trying to help you rather than an upselling technique.
>
> Participant 3

> " The layout was very simple but effective. If someone else was using, like my father, even he'd find it easy to use.
>
> Participant 5

> " (…) I just like it. It streamlines using the website and makes it easier for me. Although I'm not a big website fan, I think it's definitely handy to have the reminders there. People make mistakes and end up with stuff they don't need.
>
> Participant 4

> " I think it's very useful! (…) you get all the bits that you need in one go, and you've not had to leave the page.
>
> Participant 5

> " I like the suggestions! It was clean and clear and made me comfortable that I'm not going to go away with one handle short (…) and the recommendations are all working for me and I like what they have done with that!
>
> Participant 9

> " Yes, I like it, because it's giving me information that I need, rather than me having to go look for it.
>
> Participant 10

> " I like them and they are useful, but I would tweak them slightly.
>
> Participant 11

> " I like these options! It's just a really good prompt straight in front of you. (…) it was a good recommendation and not a suggestion what I should buy.
>
> Participant 12

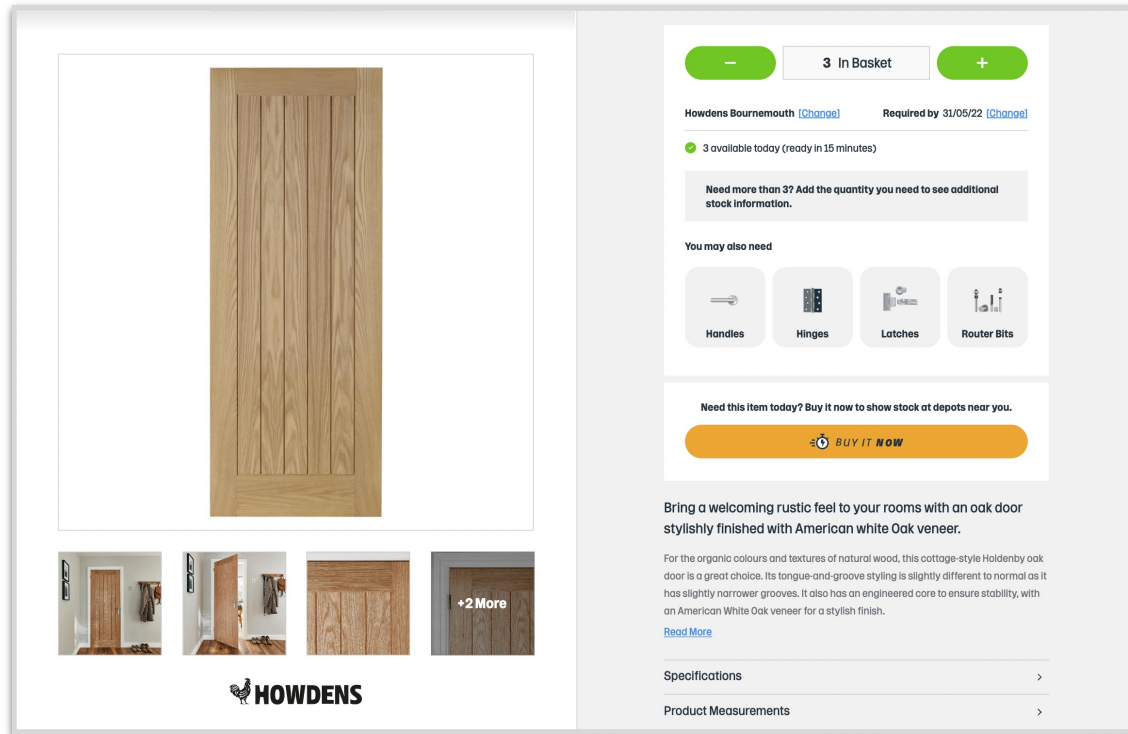> " As a first time user, I felt it was particularly intuitive.
>
> Participant 4

> " I trust the website to guide me through the checkout process, especially with my dyscalculia.
>
> Participant 3

Participants had a positive initial reaction when they saw the recommended categories

Scenario 1A

> ❝ I think that's great! It smoothly brought the page down and focused my eyes on the categories. It's nice and clear.
>
> Participant 5

GOOD: All participants commented positively once they discovered the categories of *You may also need*.

GOOD: Around half of the participants discovered the automatic page scroll that focused on the categories section.
- Majority of those liked it as it brought the page down smoothly and focused their eyes on the categories.
- One participant was indifferent about it and another mentioned that he is unsure about it as users may miss the content placed above it.
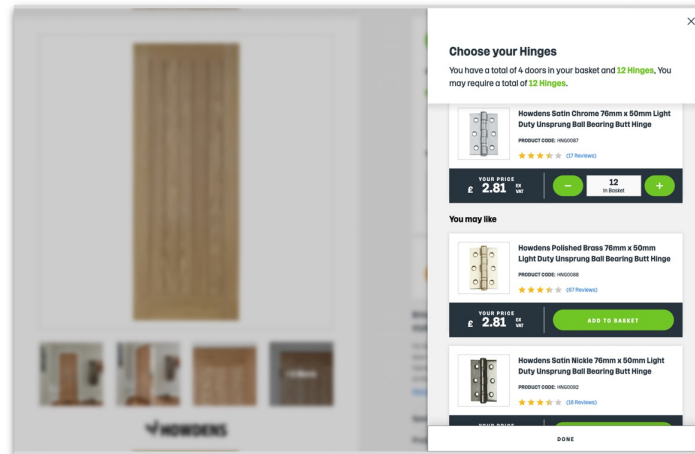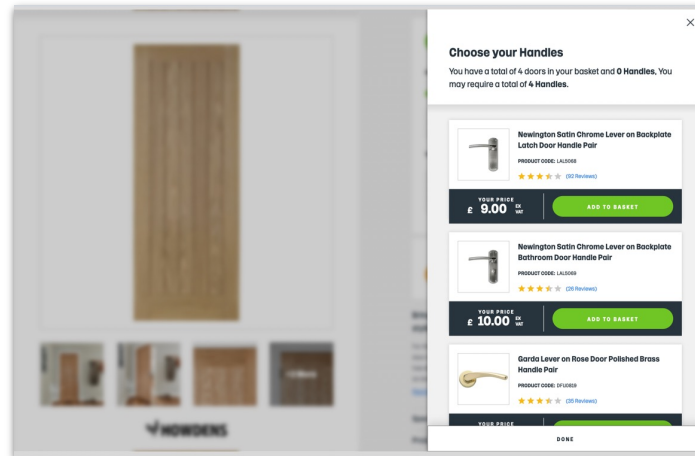
IMPORTANT: One participant mentioned that he would like to see a visual cue around the category boxes indicating that the correct number of product units were added.

RECOMMENDATIONS
- Is there a way to indicate when the correct number of items has been added on the icons?

The quantity indicator was liked by all participants, but often missed at the start

Scenario 1A

IMPORTANT: The majority of participants did not immediately notice the subheading at the top of the panel which indicates the number of handles required. This is because their attention went straight to the items below.

- However, once discovered, that feature was understood, liked and found useful by all participants.
- Especially when the text turned green (indicating that the numbers of doors line up with the number of handles) we could identify a general feel of joy and satisfaction amongst all participants.
- However, one participant mentioned that once the numbers turned green, the second sentence seemed unnecessary.

The majority of participants successfully used the stepper to increase or decrease the quantity. When the required number was a high value, the majority of participants clicked directly into the numbers field to adjust the quantity with their keyboard.

IMPORTANT: Most participants clicked on *Done* once the correct number of handles was added. When asked about the difference between *Done* and the *X*, the majority stated that they felt clicking *X* would exit the panel without saving the basket update. This was despite the majority spotting that the items were already in the basket. *Done* was the "safer" way to progress.

RECOMMENDATIONS

- Make the paragraph stand out more. Either by highlighting incorrect quantities in orange or by repositioning that box closer to the done button.

> " I like that! I think the fact that it turns green once you've hit the right quantity is a good thing.
>
> Participant 12

All participants liked the recommendations banner, although the majority did not discover it straight away

Scenario 1A

> " I thing ignore and close does the same thing, right? But anyway that bar is a good feature; I love it!
>
> Participant 4

ISSUE: The majority of participants did not discover the recommendations banner immediately.

- Some mentioned there was too much yellow on the page.
- Some mentioned it looked like a footer or an ad banner and that's why they did not pay attention to its content.

GOOD: Once discovered, all participants found the suggestion bar useful.

- The majority of participants successfully identified that by clicking *Show Alternatives,* alternative door(s) will appear on screen.
- Most participants believed that the suggestion bar would disappear either by clicking *Ignore* or *X* – they believed both buttons had the same function.
- Some participants were particular about what the alternative was and mentioned that they would need to sign the product recommendation off with their client.

RECOMMENDATION

- Consider a way to make the recommendations bar more visible.
- Consider changing the wording of *Ignore* to communicate clearly that it removes that particular suggestion from the suggestion box. In a later round of testing, consider adding a greater amount of suggestions to test whether users will utilise the *Ignore* button and find it useful.

All participants expected the alternative to be available on the required date

Scenario 1A
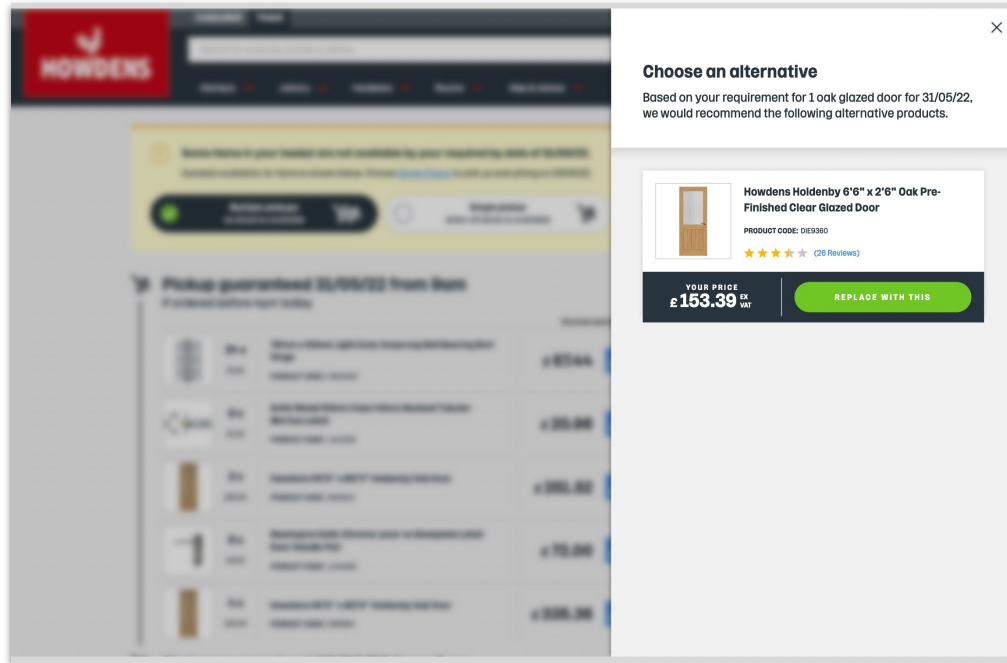
GOOD: All participants expected that the alternative shown would be in stock for the selected date.

- Most mentioned that Howdens would not suggest something which is out of stock.

- Majority of participants liked the button label *Replace With This*.

- All participants expected that by clicking *Replace With This*, the door which is currently not available will be replaced with the alternative and automatically updated within the basket.

IMPORTANT: A few participants mentioned that in real life it needs to be more or less the same door and should not differ in colour or size. Some participants noticed the different sizes in the prototype.

IMPORTANT: Some mentioned that it would be handy to have the current and the alternative item next to each other so it would be easier to compare.

RECOMMENDATIONS

- Is there a way to compare the item that is not in stock and the alternative?

The majority of participants did not like the way recommendations were displayed in scenario 1B
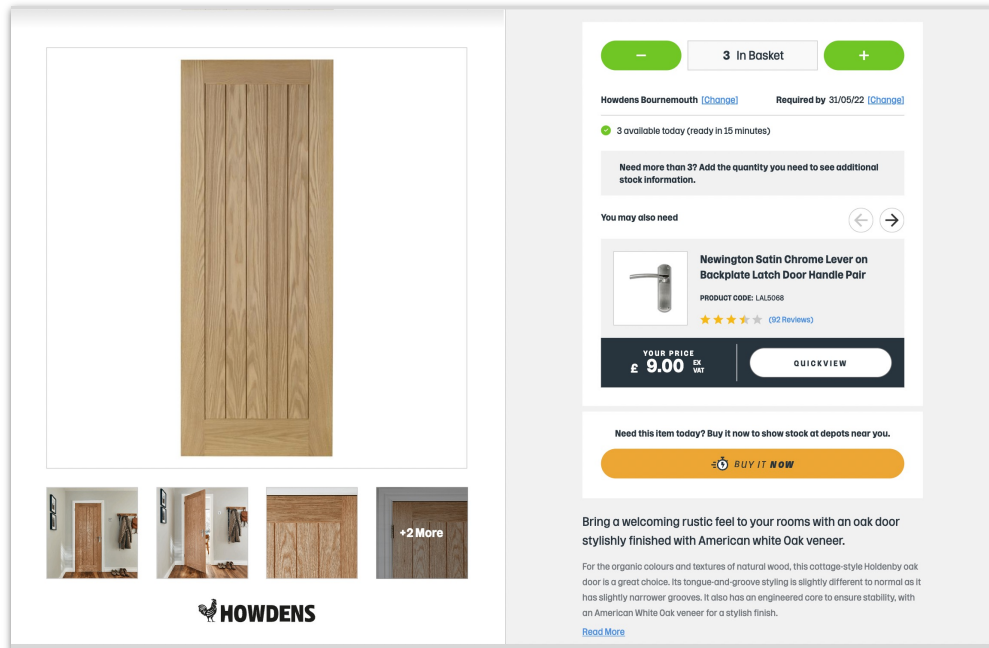
Scenario 1B

IMPORTANT: The vast majority of participants did not react positively when presented with scenario 1B due to the following reasons:

- It was unclear how many suggestions the carousel would include.

- It was not immediately visible that the carousel included handles, hinges and latches.

- Some participants tried to click on the image or title, expecting that it would open the panel.

RECOMMENDATIONS

- Show the users how many pages/items are in the carousel.

- Make it clear from the start that the carousel includes not only handles, but also hinges and latches.

- We would not recommend using this variant.

The majority did not know how many handles, hinges or latches they needed to add

Scenario 1B

> " That version is just a bit rubbish
>
> Participant 5
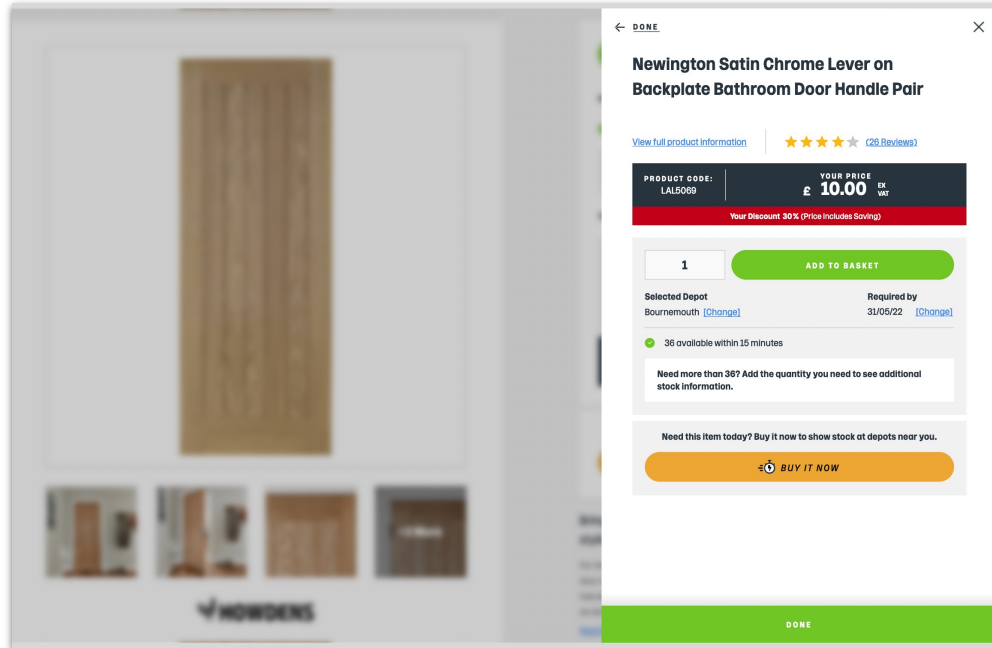
IMPORTANT: Almost all participants struggled to add the correct number of handles, hinges and latches as there was no indication of how many they would need.

- Additionally, participants were confused as hinges often come in packs of two.

Some mentioned that they would like an image of the item and that they would expect to see one in *Quickview*.

One participant did not see the green *Done* button and stated that this is because the focus and important information is in the top half of the panel.

RECOMMENDATION

- In a similar way to 1A, add the recommended product units.

- Add imagery to the *Quickview*.

The majority found the recommendation bar displaying under and over quantities useful

Scenario 2

> " I like this (...) It's telling me I don't have enough handles which is great!
> Participant 2

GOOD: All successfully discovered the recommendation bar on the bottom of the screen.

- Although this basket page is less busy than in previous scenarios; that might be due to learnt behaviour.

GOOD: Participants liked the recommendation bar and understood the messaging.

- However, some participants were confused as the handle displayed was not the same as they had in their basket.

GOOD: All participants successfully identified that by clicking change quantities they were able to adjust quantities.

IMPORTANT: Most participants still believed that clicking on *Ignore* or the *X* would both close the bar.

RECOMMENDATION

- As with the previous scenarios, make sure the recommendation bar is clearly visible.
- Think about a way users can recover if they accidently click on *Ignore* or the X.

The majority of participants liked and understood the side panel to adjust quantities
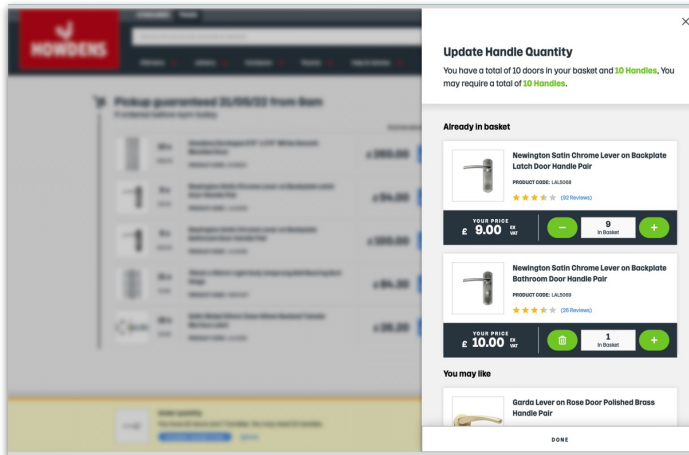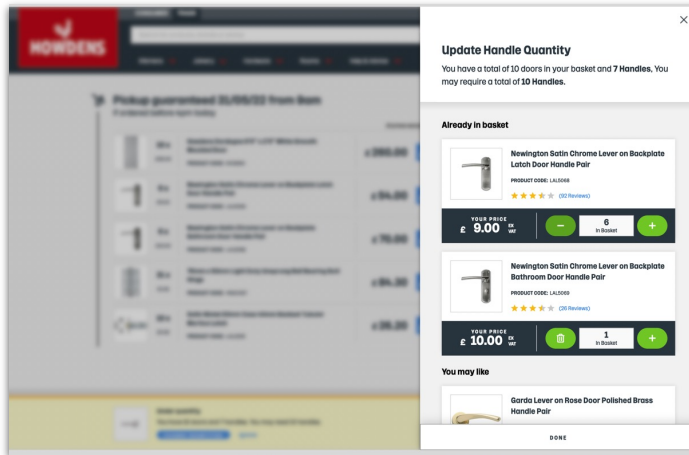
Scenario 2

GOOD: Majority of participants understood and liked how they were able to amend the quantities through a side panel without leaving the basket page.

- This panel already resonated well in scenario 1A; that might be a learnt behaviour as all participants discovered the subheading at the top straight away.

- However, some participants did not like the *You may also like* as it reminded them of the more traditional cross and upsell techniques where they regularly see items that are not relevant.

Similar to scenario 1A, participants preferred to click on *Done* rather than on *X*, as it felt more secure to progress that way without losing any input.

> " I like that it gives the confirmation when it goes green; it's handy and it prevents slip ups.
>
> Participant 4

Other findings

Other findings

Finding type	Area	Finding	Recommendation
Issue	Scenario 1B - panel	Some participants tried to click on the image or product titles instead of *Quickview*.	
Insight	Scenario 1A - panel	One participant mentioned that a link to *see all* the items would be handy at times, especially when there are a lot to choose from.	Is it possible to provide a link to *see all* products?
Insight	Scenario 1A - panel	One participant accidently clicked on *Add to basket* instead of *Done*. Interestingly that happened in our pilot, but apart from one, it was not an issue during testing.	
Insight	Scenario 1A - basket	One participant mentioned that the basket page looks "busy" and the recommendation box can be overlooked. He then recommended to integrate the recommendation next to the relevant product.	

Other findings

Finding type	Area	Finding	Recommendation
Insight	Basket (1A + B)	One participant mentioned he would like to see *You might consider other products*, like on Amazon.	
Insight	Basket (1A + B)	One participant mentioned that he would like to see cheaper or better alternatives when in basket.	
Insight	Scenario 1B - Basket	One participant mentioned that the basket in scenario 1B looks too busy.	
Insight	Scenario 1A - Basket	Some participants believed that if the suggestion box was in a different colour, it would stand out more.	We believe that issue could be solved with a micro interaction. For example, introducing a slight delay before the box appears.

Pre & post-test interview findings

Pre-test interview findings

Previously ordered from the Howdens website

- As with the last round, the majority of participants tend to use the current website for research purposes and do not order directly through the website. They prefer to phone the depot or go into a store.

How often they order from Howdens

- On average, the majority of participants order from Howdens at least once a month. Roughly half the participants order bi-weekly.

Which other merchants' websites are used

- Nearly all participants used Screwfix and Toolstation. Wickes was the third most popular, followed by Buildbase. Brewers Decorator Centres, Crown Decorator Centres and Travis Perkins were also mentioned.

Using the same depot vs. different depots

- Most participants use the same depot because of the convenient location and the relationships they have built with the depot's employees. Occasionally some participants use different depots, depending where they are working.

Pre-test interview findings

How they share products with their clients

- There was a fairly even split between participants who shared 3D models with clients, those who shared links to products, and others who do not share products.

Attitudes toward product recommendations

There were a variety of outlooks toward product recommendations:

- Around half of participants said they find them useful, provided they are relevant.
- The other half are generally sceptical towards recommendations, citing business interests and poor algorithms as the main reasons.
- Around a 1/3 of participants said they usually ignore product recommendations.

Examples of other websites that have good product recommendations

- Amazon
- Screwfix
- Toolstation
- eBay
- Wickes

Post-test interview findings

Out of the two options for recommendations (1A or 1B) which do you prefer? Why?

- The preference for 1A was almost unanimous. Only 1/9 preferred 1B.

> " 1A over 1B. It's nice being able to select from a number of categories on screen. They (Howdens) have nailed it!
>
> Participant 2

> " Definitely 1A, because it's more concise.
>
> Participant 1

> " 1A because I think having all categories on screen at the same time is preferable.
>
> Participant 4

> " I prefer 1A. It's a lot smoother and there's less clicks. 1B is a bit rubbish!
>
> Participant 5

> " I prefer 1A because it shows you the recommended amount, whereas in 1B I couldn't remember what was in the basket.
>
> Participant 11

> " 1A because it gives you all the options on one page.
>
> Participant 12

> " Once I got to grips with 1B I liked it more as it didn't seem as complicated as the other one (…) and the carousel was like flicking through a catalogue of products. However, the text that told me what I had, what I might need and that changed colour was the best part the whole thing. Once that was gone, it was scary, honestly.
>
> Participant 3

Post-test interview findings

Are recommendations something you would use or react to?

- Participants were unanimous in believing that recommendations were something they would use or react to.

> " Absolutely yes, because I've got a terrible memory.
>
> Participant 1

> " They were relevant, so yeah they've absolutely nailed it.
>
> Participant 2

> " They are a good reminder. It's a good way of finding the product you want.
>
> Participant 4

> " I would use recommendations as long as they are relevant.
>
> Participant 9

> " I would 100% use recommendations.
>
> Participant 5

> " It works really well (…) it's the shortcut of being able to order everything quicker.
>
> Participant 11

> " This genuinely felt like they were recommending something, rather than trying to upsell you. So it was helpful, because for me I could order doors and completely forget that I needed any of the hardware.
>
> Participant 3

Post-test interview findings

Would the recommendations make you more or less inclined to use Howdens website in the future?

- Participants were also unanimous in saying they would be more inclined to use Howdens' website in the future.

> " Yes. The website is a lot better, a lot simpler and a lot quicker.
>
> Participant 9

> " Yes. Get it live! I'm enjoying it (…) every time it's getting better.
>
> Participant 3

> " I would, the layout was very simple but effective. If someone else was using it, like my father, even he'd find it easy to use."
>
> Participant 5

> " The recommendations make the process of ordering quicker and easier.
>
> Participant 11

> " Certainly more. 100% I would be on it a lot more.
>
> Participant 12

> " More inclined because you know it's going to give you that reminder on the journey.
>
> Participant 1

> " The website is a better than it used to be and if they're going down this route of telling me if something is in stock, that's exactly what I want. Knowing that I want a door frame, handle or hinges and that it's in stock and I can have it – that's really good.
>
> Participant 10

Post-test interview findings

Was there anything you think could be improved?

- The participants had various recommendations for improvements. One consistent suggestion was improving the UI of the yellow suggestion bar to make sure it would be seen.

❝ I think the position of the yellow suggestion bar should be changed. It's at the bottom of the screen where you wouldn't necessarily see it.
Participant 1

❝ The yellow boxes at the bottom and top of the checkout page take up too much real estate. There's too much warning.
Participant 2

❝ Maybe the project list. I thought "is it my basket or not?" It wasn't very clear to me.
Participant 5

❝ Having product alternatives below each product might stand out more than being in the yellow box at the bottom of the screen.
Participant 10

❝ If I'm honest, I didn't like the banner at the bottom (suggestion bar) because it looked like an advertising popup. Another improvement would be adding a link in the item pop-up where you could see "all handles" or "all hinges".
Participant 11

❝ The next stage would be like the Amazon approach where they say "you might need this" or "people who bought this also bought …".
Participant 9

Next steps

Next steps

- We recommend another round of testing on desktop (focusing on scenario 1A).
  - In the next prototype, consider including more products in the product side panel. This iteration would make the prototype more closely mimic the reality of using the real website and would enable us to discover whether the amount of products in the side panel influences the ease at which users navigate to and find their desired product.
  - Consider including more suggestions in the *recommendation box* to test if users would use ignore or if they just use the arrows to go from one recommendation to the other.
- Once desktop testing is completed, it would be good to test the experience on mobile.

Appendix

Participant details

Participant details

P#	Session Time	Length of Time with Howdens	Placed an Order with Howdens in Last 6m	No. of Purchases from Website in Last 6m	No. of Times Logged in to Account in Last 6m	Trade Account Merchant Name(s) & How Shopped With Them (IS - In Store; APP - App; WEB - Website)	Participant's Trade(s)	Gender & Age	UK Location	Computer Competency Level
***P1	09.30-10.30 hrs	6-12 months	Yes	1-4 purchases	1-4 times	Benchmarx - WEB Jewsons - WEB Srewfix - APP Toolstation - APP Topps Tiles - WEB	Bathroom Fitter / Electrician / General Builder / Kitchen Fitter / Plumber / Tiler	Male 41	Essex	Expert
***P2	11.00-12.00 hrs	1-2 years	Yes	Has not placed an order via website in last 6m	5+ times	B&Q Tradepoint - IS, WEB Screwfix - IS, WEB Toolstation - IS, WEB	Bathroom Fitter / Electrician / General Builder / Kitchen Fitter / Plumber / Tiler / Property Developer	Male 43	Bath	Expert
***P3	12.30-13.30 hrs	1-2 years	Yes	1-4 purchases	5+ times	B&Q Tradepoint - IS Screwfix - APP, WEB Toolstation - APP, WEB	General Builder & Decorator	Female 33	Kent	Expert
P4	14.30-15.30 hrs	1-2 years	Yes	Has not placed an order via website in last 6m	5+ times	B&Q Tradepoint - IS, APP, WEB Jewsons - IS Screwfix - IS, WEB Toolstation - IS, WEB Travis Perkins - IS	Kitchen Fitter / Cabinet maker	Male 46	Bath	Advanced
***P5	16.00-17.00 hrs	6-12 months	Yes	Has not placed an order via website in last 6m	1-4 times	B&Q Tradepoint - IS Screwfix - IS, APP, WEB Selco - IS, APP, WEB Toolstation - IS, APP, WEB Travis Perkins - IS, APP, WEB	General Builder & Property Investment	Male 36	Manchester	Expert

***Participants who took part in previous rounds

Participant details

P#	Session Time	Length of Time with Howdens	Placed an Order with Howdens in Last 6m	No. of Purchases from Website in Last 6m	No. of Times Logged in to Account in Last 6m	Trade Account Merchant Name(s) & How Shopped With Them (IS - In Store; APP - App; WEB - Website)	Participant's Trade(s)	Gender & Age	UK Location
***P9	14.30-15.30 hrs	3-5 years	Yes	5+ purchases	5+ times	B&Q Tradepoint - IS, APP, WEB Screwfix - IS, APP Topps Tiles - IS	Property Developer	Male 43	Scotland
P10	16.00-17.00 hrs	3-5 years	Yes	Has not placed an order via website in last 6m	1-4 times	B&Q Tradepoint - IS Jewsons - IS Screwfix - APP Toolstation - OL Topps Tiles - IS Travis Perkins - IS	General Builder	Male 55	Exeter
P11	09.30-10.30 hrs	11-20 years	Yes	1-5 purchases	5+ times	"B&Q Tradepoint - IS, OL Benchmarx - IS, OL Buildbase - IS, OL Jewsons - IS Screwfix - IS, APP, OL Selco - IS Toolstation - IS, OL Topps Tiles - IS Travis Perkins - IS, APP, OL"	Kitchen Fitter	Male 36	West Midlands
***P12	11.00-12.00 hrs	1-2 years	Yes	5+ purchases	5+ times	B&Q Tradepoint - IS, APP, WEB Screwfix - IS, APP, WEB Toolstatin - IS, APP, WEB	Electrician	Male 39	Derbyshire

***Participants who took part in previous rounds

Bunnyfoot

Thank you

We hope to work with you soon

—

Your consultant:

Severin Rupprechter

severin@bunnyfoot.com

For enquires or project briefs:

Paul Wallis

Paul@bunnyfoot.com | 01235 606 143

London

T: 020 7608 1670

5th Floor, 54 St John's Square,
Farringdon, London,
EC1V 4JL

Oxford

T: 01235 606 140

134 Boston House
Downsview Road, Wantage
Oxfordshire, OX12 9FF

Sheffield

T: 0114 698 1014

Studio 3, Sellers Wheel
151 Arundel Street
Sheffield, S1 2NU