

WANDR · FREE RESOURCE

The B2B SaaS UX Checklist

The 40 problems we find again and again across 37 SaaS and software products we've audited and redesigned, from onboarding to dashboards to design debt. Each one comes with what failing looks like.

HOW TO USE IT

Score your product in 30 minutes

1. Open your product the way a new customer would: a fresh account, no bookmarks, no help from your team.
2. Go section by section and tick each check you pass. Be strict: "mostly" is a no.
3. Count your ticks per section. Your lowest section is where to start.

01 · Onboarding & first run	___ / 7
02 · Navigation & structure	___ / 7
03 · Dashboards & data	___ / 6
04 · Workflows, forms & tables	___ / 6
05 · Feedback, errors & safety nets	___ / 5
06 · Consistency & design system	___ / 5
07 · Website & signup	___ / 4
Total	___ / 40

Reading your score: 35+ is strong. 25–34 means real money is leaking from at least one flow. Under 25, start with onboarding and navigation: that's where we see the most drop-off and the most support tickets.

01

Onboarding & first run

Does a new user reach value before they reach a wall?

- ☐ **New users land on a clear first task, not an empty screen.**
An empty dashboard with no next step is where trials stall.
- ☐ **You show value before asking for sensitive data.**
SSNs, bank details or card numbers up front, before any payoff, drive drop-off.
- ☐ **Every sensitive ask says why you need it.**
One line of "here's why" next to the field beats a privacy policy link.
- ☐ **Setup works without a sales call or a support rep.**
If activation needs a human, your onboarding is a service, not a product.

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- ☐ **Setup follows how the customer thinks, not how the database is built.**
Forcing users through your data model's order is a classic first-run killer.
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- ☐ **Onboarding fits both beginners and power users.**
One flow for everyone either bores experts or loses beginners.
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- ☐ **Multi-step setup shows progress and steps left.**
People quit flows when they can't see the finish line.
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02

Navigation & structure

Did your product grow one feature at a time? We call it the Frankenstein product.

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- ☐ **The menu is organized around user goals, not your org chart.**
Nav that mirrors internal teams or processes makes users learn your company first.
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- ☐ **A first-time user finds a core feature without getting lost.**
Ask a new user to find one feature. Watch, don't help.
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- ☐ **Related features live together, not in separate apps or tools.**
Modules bolted on over the years make one product feel like five.
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- ☐ **Every label means one thing, everywhere.**
A menu item that opens a page with a different name breaks trust.
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- ☐ **No two menu items lead to near-identical pages.**
Two "Reports" areas means nobody knows which one is real.
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- ☐ **Long lists and menus have search.**
Scrolling through hundreds of records is a task, not a feature.
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- ☐ **Someone has reviewed the overall structure since launch.**
Most IA is never revisited, just added to, sprint after sprint.
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03

Dashboards & data

Does your dashboard tell a story, or dump numbers?

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- ☐ **The dashboard puts what needs attention first.**
Equal weight for everything means nothing stands out.
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- ☐ **Every score or number explains what it means.**
A raw "72" with no context makes users do the analysis you promised to do.
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- ☐ **The same kind of data uses the same chart everywhere.**
Different chart styles for the same data make users think it's different data.
 - ☐ **No data is repeated in two places on one screen.**
Duplicates add clutter and make people doubt which number is right.
 - ☐ **Prime dashboard space holds key metrics, not filler.**
Slideshows, promos and low-value widgets steal the most-viewed pixels in your product.
 - ☐ **Users can choose what they see first.**
Different roles care about different numbers. Let them pin theirs.
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04

Workflows, forms & tables

Does the workflow match how people actually work?

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- ☐ **Repetitive data entry is cut or automated.**
If users keep a spreadsheet next to your product, your product is missing a feature.
 - ☐ **Long forms are split into short, logical steps.**
Twenty fields on one screen push the complexity onto the user.
 - ☐ **Tables support real tasks: find, sort, filter, compare.**
Core jobs, like finding one customer, shouldn't mean scanning a long list.
 - ☐ **Filters and controls work the same in every section.**
The same control behaving differently per screen doubles the learning curve.
 - ☐ **Users can see the status of their work inside the product.**
Approvals and handoffs that live in email are invisible and get lost.
 - ☐ **Dense tables are redesigned for small screens, not shrunk.**
Squeezing a 12-column table onto a phone isn't responsive design.
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05

Feedback, errors & safety nets

When something happens, or goes wrong, does the user know?

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- ☐ **Every action confirms that it worked, or says what failed.**
Silent saves and silent errors send users straight to support.
 - ☐ **Work saves automatically.**
Losing an hour of work once is enough to lose a customer.
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- ☐ **Empty, loading and error states are designed, not default.**
Blank screens and raw error codes feel like a broken product.
 - ☐ **Risky actions have a confirm step or undo.**
Accidental deletes are one of the most common user mistakes we see.
 - ☐ **Users can fix common problems without calling you.**
A findable help center or troubleshooting guide is cheaper than every ticket.
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06

Consistency & design system

Does it look and act like one product?

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- ☐ **There's one shared component library, not rebuilt UI per screen.**
Same button, five versions: that's design debt, and engineers pay for it.
 - ☐ **Similar actions look and behave the same everywhere.**
Export in one place, Download in another, a cloud icon in a third.
 - ☐ **Icons share one style and size.**
Mixed filled and outline icons quietly signal "nobody owns this."
 - ☐ **Modules built by different teams still feel like one product.**
As teams grow, patterns drift unless someone guards them.
 - ☐ **There's a clear process to keep new features consistent.**
Without one, every new feature adds another one-off pattern.
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07

Website & signup

Can a buyer get it and get in?

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- ☐ **A visitor can tell what the product does within seconds.**
If the homepage describes the company instead of the product, buyers bounce.
 - ☐ **Each page has one primary call to action.**
Free trial, demo, call and newsletter all at once split every click.
 - ☐ **Proof sits near the decision, not buried.**
Logos, numbers and testimonials belong next to the CTA, not at the bottom.
 - ☐ **Signup asks for the minimum, then earns the rest.**
Every extra field before value costs you signups.
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WANT A SECOND PAIR OF EYES?

We'll walk through your product with you.

WANDR has designed and fixed products for 500+ clients over 10+ years, from early-stage SaaS to enterprise platforms. If your checklist score surprised you, book a 30-minute call with Lina and we'll tell you where we'd start.

Book a call → calendly.com/linasc/30min

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