FLOW AUDIT

SELF-INITIATED AUDIT
7 OCTOBER 2026

From Signup to First Widget

Six usability findings in the first-run experience, and how to fix each one

PRODUCT

Geckoboard (KPI dashboards)

TARGET METRIC

Trial-to-paid conversion

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METHOD

Heuristic evaluation against established usability principles



ABOUT THIS AUDIT

This audit is self-initiated. Nobody at Geckoboard asked for it. I ran it on a standard free trial with sample data, without access to your analytics or users. Read the findings as an outside evaluator's view, to be checked against your own data.

Findings at a glance

Finding 1 · Minor
The questions don't say why the data is needed or how it will be used, so the user skips.

Finding 2 · Minor
Nothing explains why they're here or what comes next.

Finding 3 · Minor
No way to narrow 90+ data sources by type.

Finding 4 · Minor
The error "Could not find spreadsheet file" doesn't say why it failed or what to try next.

1 **Sign up**
User is trying to get into the product quickly and start a trial.

2 **Setup questions**
User is trying to get past setup and reach the product.

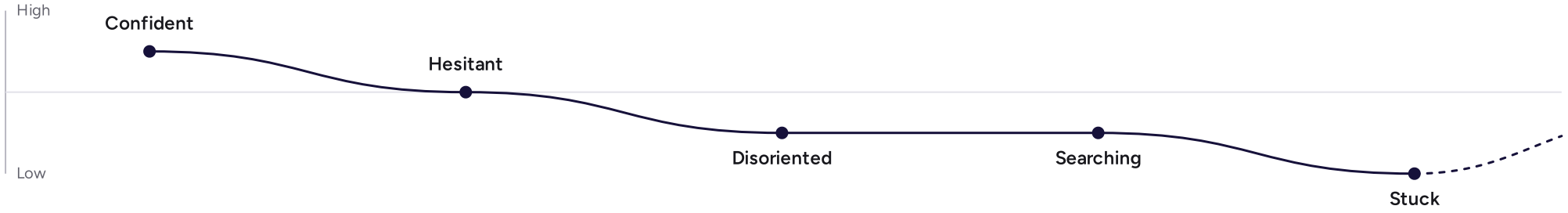
3 **Landing on "Connect your data"**
User is trying to work out where they are and what to do next.

4 **Finding the data source**
User is trying to find the option for their spreadsheet.

5 **Connecting the spreadsheet by link**
User is trying to connect their Google Sheet by pasting its link.

USER EMOTION AT EACH STEP

Evaluator's read of the session, not user research data.



Major · Minor

Continues on page 3

Continued from page 2

Finding 5 · Major
No way to tell the widget which rows to show. Text view shows only the last ticket ID. Table view shows every ticket, open and solved together.

Finding 6 · Major
The widget shows 42 rows, all “Solved”, and gives no sign that the other 133 rows are hidden.

6

Connecting through Google Drive

User is trying to give access and select their support tickets sheet.

7

Selecting the data

User is trying to pick the Ticket ID and Status columns.

8

Configuring the widget

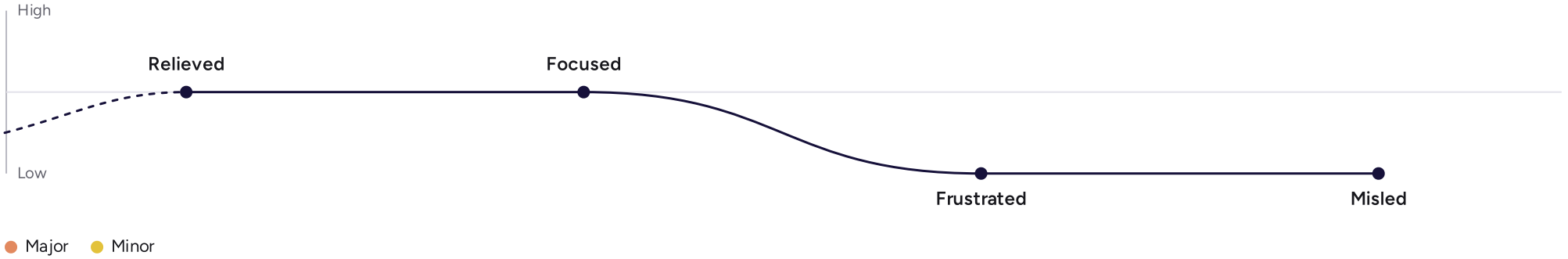
User is trying to show only the IDs of tickets with the status Open.

9

Widget on the dashboard

User is trying to see the full list, or at least the open tickets.

USER EMOTION AT EACH STEP



Scope

USER ROLE	Head of Support, not a dashboard specialist
GOAL	Create an account and build a dashboard to see open tickets, response time and satisfaction
START POINT	Signup form
END POINT	A first widget showing correct data from the team's spreadsheet
DATA USED	A Google Sheet of 175 support tickets over 60 days

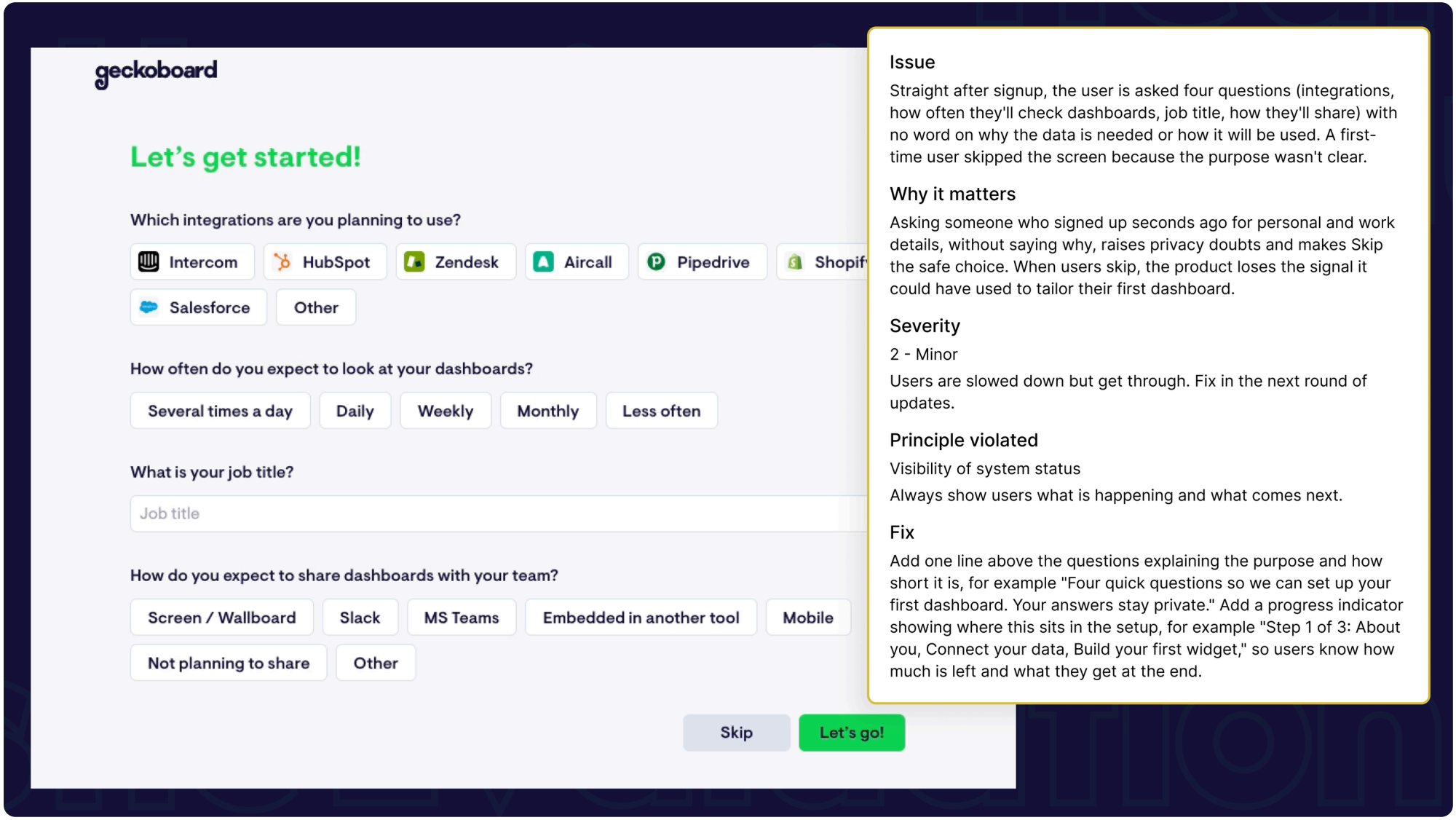
Date	Ticket ID	Agent	Channel	Status	First response (mins)	Resolution time (hrs)	CSAT (1 to 5)
2026-08-01	T-1001	Marcus	Email	Solved	179	17.8	5
2026-08-01	T-1002	Marcus	Email	Solved	90	16.1	4
2026-08-02	T-1003	Marcus	Chat	Solved	6	2.0	2
2026-08-03	T-1004	Priya	Chat	Solved	8	5.6	5
2026-08-03	T-1005	Marcus	Email	Solved	80	14.2	5
2026-08-03	T-1006	Priya	Chat	Solved	3	2.6	
2026-08-04	T-1007	Tom	Email	Solved	124	21.5	
2026-08-04	T-1008	Priya	Chat	Solved	1	1.2	
2026-08-04	T-1009	Elena	Chat	Solved	8	4.2	4
2026-08-04	T-1010	Tom	Email	Solved	143	17.7	5
2026-08-04	T-1011	Elena	Chat	Solved	3	0.2	5
2026-08-05	T-1012	Tom	Chat	Solved	12	6.6	5

View all 175 rows in Google Sheets

FINDINGS IN DETAIL · FINDING 01

Setup questions

2 Minor



Issue

Straight after signup, the user is asked four questions (integrations, how often they'll check dashboards, job title, how they'll share) with no word on why the data is needed or how it will be used. A first-time user skipped the screen because the purpose wasn't clear.

Why it matters

Asking someone who signed up seconds ago for personal and work details, without saying why, raises privacy doubts and makes Skip the safe choice. When users skip, the product loses the signal it could have used to tailor their first dashboard.

Severity

2 - Minor

Users are slowed down but get through. Fix in the next round of updates.

Principle violated

Visibility of system status

Always show users what is happening and what comes next.

Fix

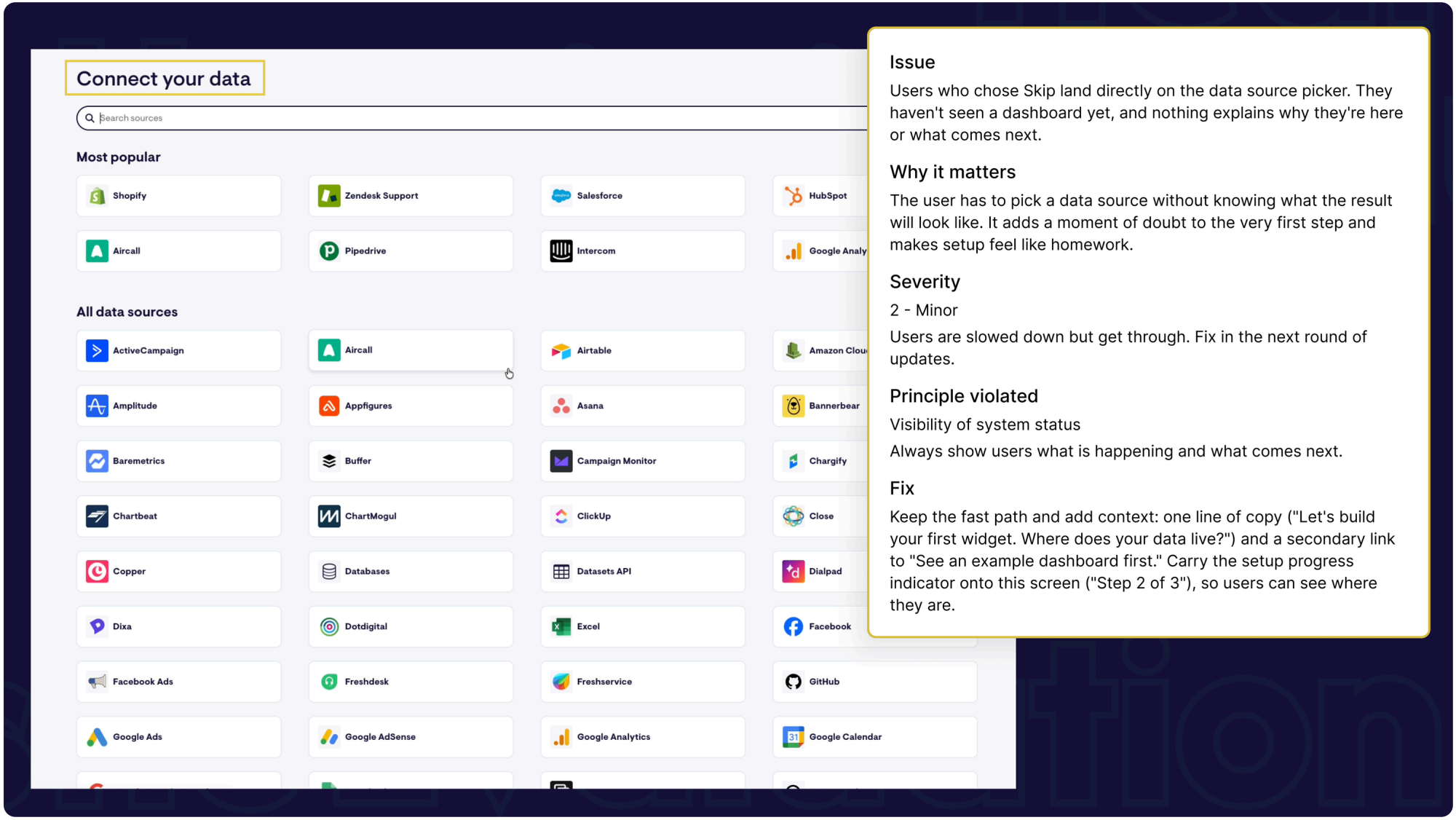
Add one line above the questions explaining the purpose and how short it is, for example "Four quick questions so we can set up your first dashboard. Your answers stay private." Add a progress indicator showing where this sits in the setup, for example "Step 1 of 3: About you, Connect your data, Build your first widget," so users know how much is left and what they get at the end.

4 Catastrophic | 3 Major | 2 Minor | 1 Cosmetic | 0 Not a problem

FINDINGS IN DETAIL · FINDING 02

Straight into “Connect your data”

2 Minor



Issue

Users who chose Skip land directly on the data source picker. They haven't seen a dashboard yet, and nothing explains why they're here or what comes next.

Why it matters

The user has to pick a data source without knowing what the result will look like. It adds a moment of doubt to the very first step and makes setup feel like homework.

Severity

2 - Minor

Users are slowed down but get through. Fix in the next round of updates.

Principle violated

Visibility of system status

Always show users what is happening and what comes next.

Fix

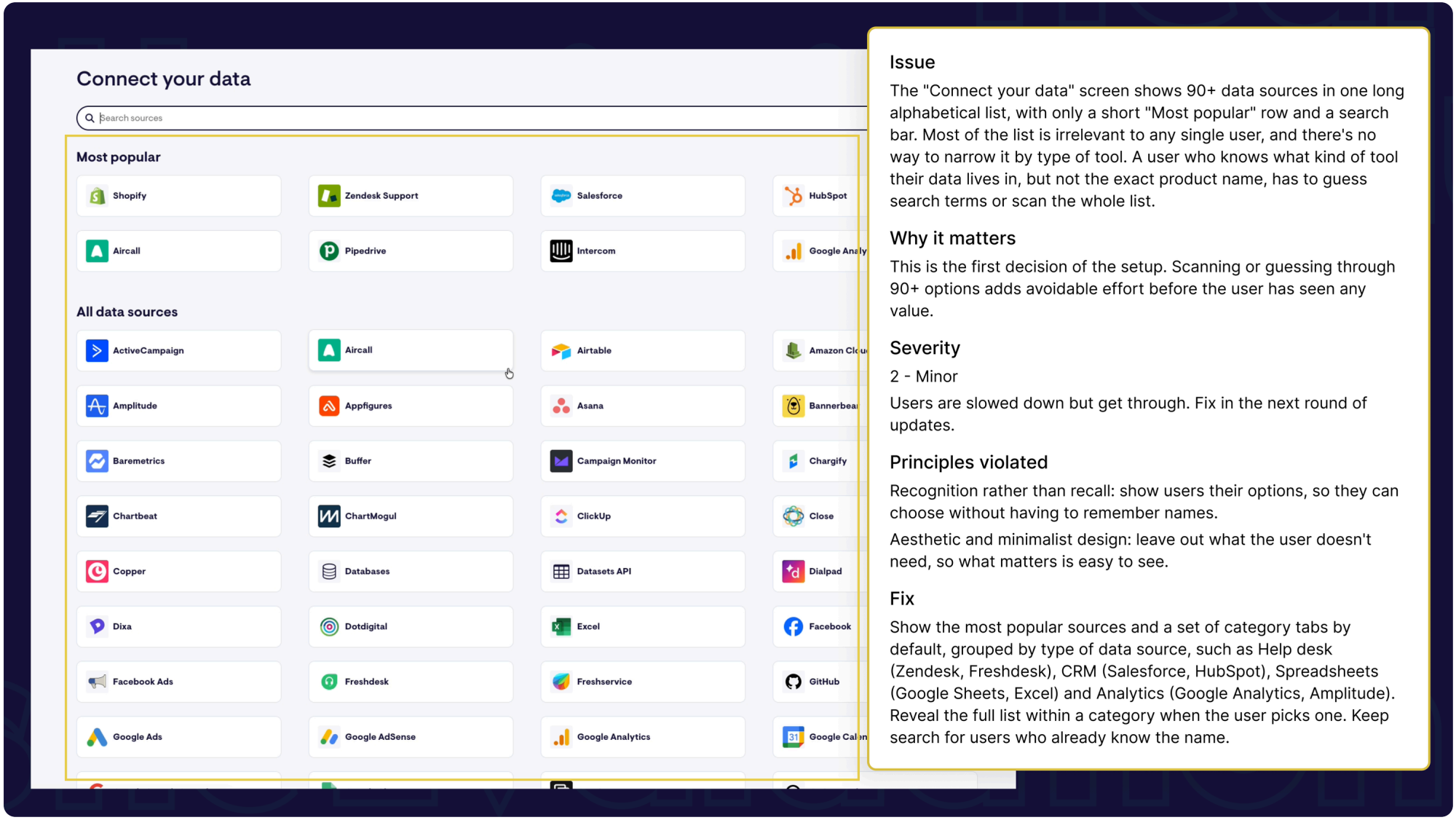
Keep the fast path and add context: one line of copy ("Let's build your first widget. Where does your data live?") and a secondary link to "See an example dashboard first." Carry the setup progress indicator onto this screen ("Step 2 of 3"), so users can see where they are.

4 Catastrophic | 3 Major | 2 Minor | 1 Cosmetic | 0 Not a problem

FINDINGS IN DETAIL · FINDING 03

Data source list

2 Minor



Issue

The "Connect your data" screen shows 90+ data sources in one long alphabetical list, with only a short "Most popular" row and a search bar. Most of the list is irrelevant to any single user, and there's no way to narrow it by type of tool. A user who knows what kind of tool their data lives in, but not the exact product name, has to guess search terms or scan the whole list.

Why it matters

This is the first decision of the setup. Scanning or guessing through 90+ options adds avoidable effort before the user has seen any value.

Severity

2 - Minor

Users are slowed down but get through. Fix in the next round of updates.

Principles violated

Recognition rather than recall: show users their options, so they can choose without having to remember names.

Aesthetic and minimalist design: leave out what the user doesn't need, so what matters is easy to see.

Fix

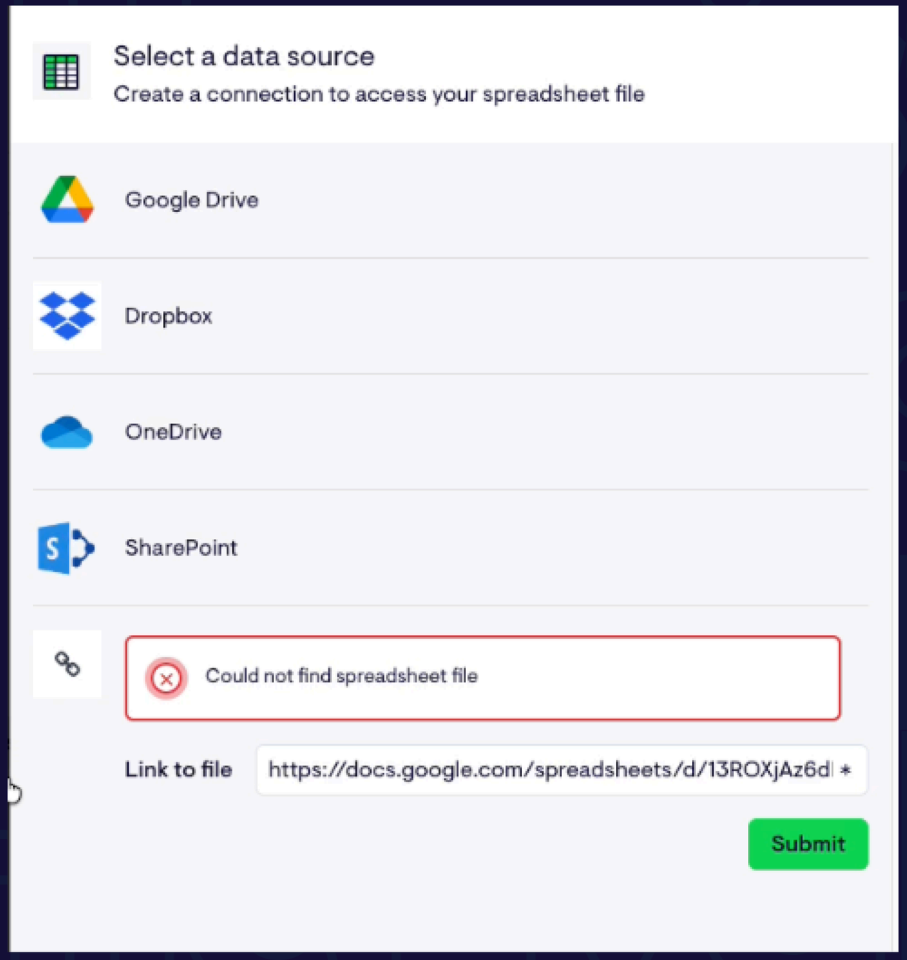
Show the most popular sources and a set of category tabs by default, grouped by type of data source, such as Help desk (Zendesk, Freshdesk), CRM (Salesforce, HubSpot), Spreadsheets (Google Sheets, Excel) and Analytics (Google Analytics, Amplitude). Reveal the full list within a category when the user picks one. Keep search for users who already know the name.

4 Catastrophic | 3 Major | 2 Minor | 1 Cosmetic | 0 Not a problem

FINDINGS IN DETAIL · FINDING 04

Spreadsheet link error

2 Minor



Issue

After the user pastes a Google Sheets link, the error "Could not find spreadsheet file" doesn't say why it failed or what to try next. Geckoboard's own guide says the sheet must be shared as "Anyone with the link," but the error doesn't mention it. The user abandoned the link option and switched to the Google Drive connection.

Why it matters

Users who don't spot the alternative stall at their very first data connection.

Severity

2 - Minor

Users are slowed down but get through. Fix in the next round of updates.

Principle violated

Help users recognise, diagnose and recover from errors.

Say what went wrong and how to fix it.

Fix

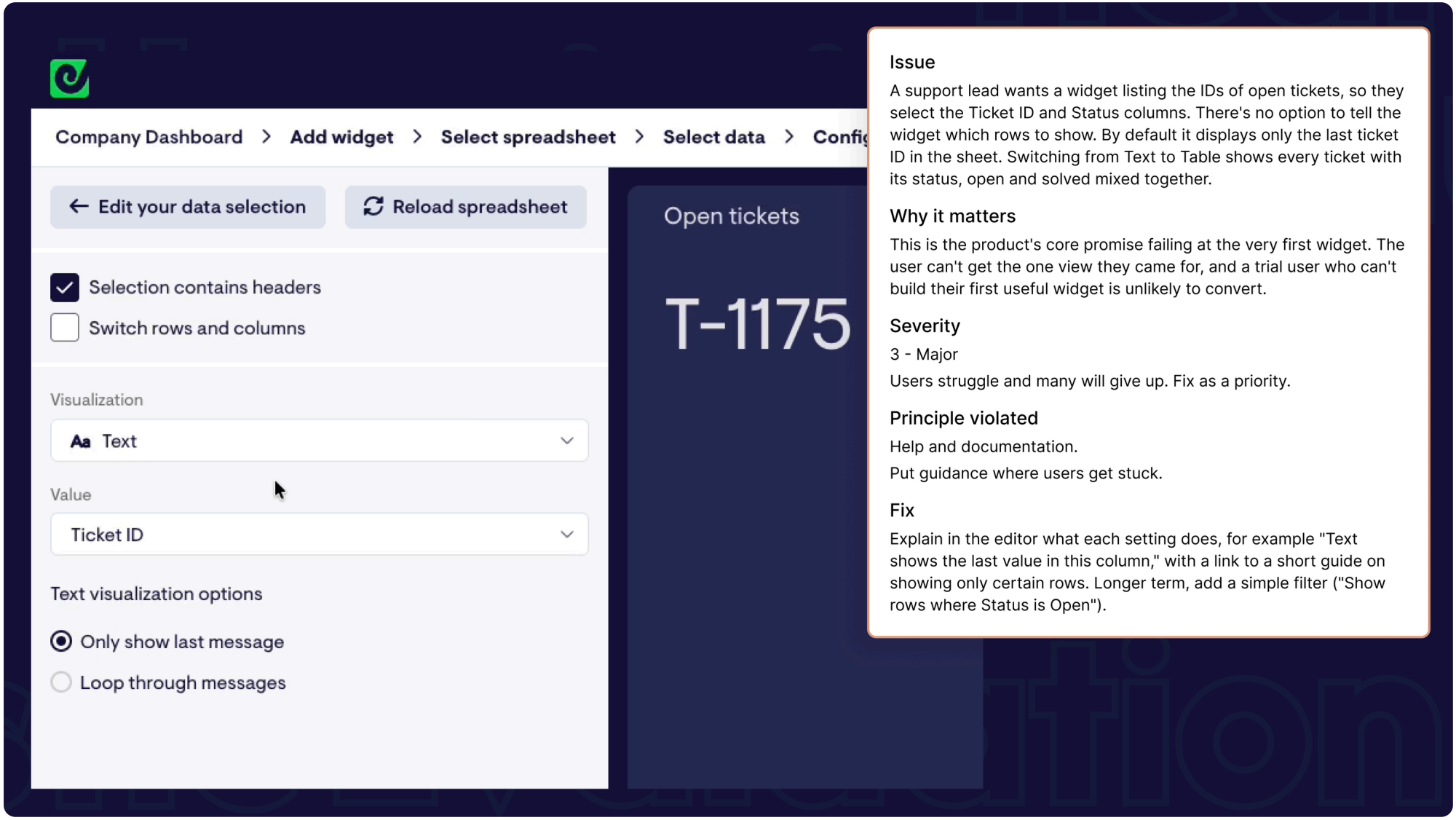
List the likely causes in the message ("Check the sheet is shared as 'Anyone with the link'"), and offer "Connect with Google Drive instead" as a button inside the error.

4 Catastrophic | 3 Major | 2 Minor | 1 Cosmetic | 0 Not a problem

FINDINGS IN DETAIL · FINDING 05

First widget can’t show what the user asked for

● 3 Major



Issue

A support lead wants a widget listing the IDs of open tickets, so they select the Ticket ID and Status columns. There's no option to tell the widget which rows to show. By default it displays only the last ticket ID in the sheet. Switching from Text to Table shows every ticket with its status, open and solved mixed together.

Why it matters

This is the product's core promise failing at the very first widget. The user can't get the one view they came for, and a trial user who can't build their first useful widget is unlikely to convert.

Severity

3 - Major

Users struggle and many will give up. Fix as a priority.

Principle violated

Help and documentation.

Put guidance where users get stuck.

Fix

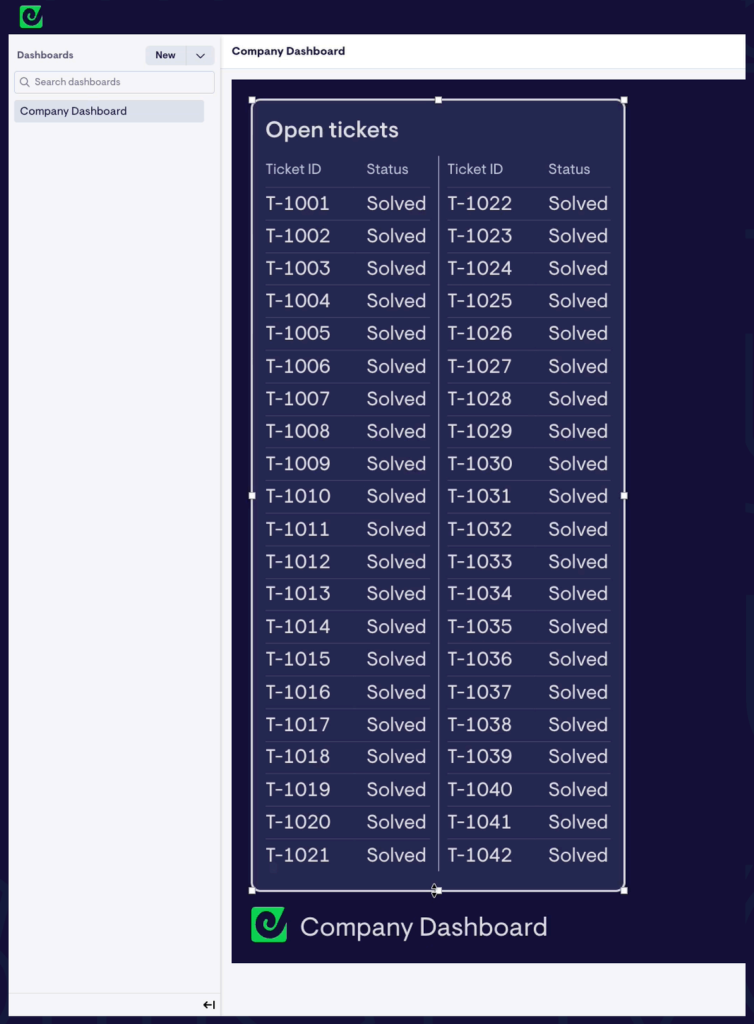
Explain in the editor what each setting does, for example "Text shows the last value in this column," with a link to a short guide on showing only certain rows. Longer term, add a simple filter ("Show rows where Status is Open").

● 4 Catastrophic ● 3 Major ● 2 Minor ● 1 Cosmetic ● 0 Not a problem

FINDINGS IN DETAIL · FINDING 06

Table widget hides rows

3 Major



Issue

Switched to a table, the widget shows at most 42 rows, even at maximum size. All of them are "Solved," and there's no sign that the other 133 rows are hidden.

Why it matters

The widget is confidently wrong. A support lead glancing at it would think there are no open tickets, which defeats the point of a live dashboard.

Severity

3 - Major

Users struggle and many will give up. Fix as a priority.

Principle violated

Visibility of system status

Always show users what is happening and what comes next.

Fix

Show a row count ("Showing 42 of 175") and let users scroll or page through the rest.

4 Catastrophic | 3 Major | 2 Minor | 1 Cosmetic | 0 Not a problem

What works well

SHORT SIGNUP

Four fields, phone number optional, and no card needed to start the trial. Getting in takes under a minute.

CLEAR LOCATION IN THE WIDGET EDITOR

The breadcrumb (Company Dashboard › Add widget › Select spreadsheet › Select data › Configure widget) always shows where you are and offers an easy way back.

SUPPORT OFFERED WHEN A SOURCE ISN'T LISTED

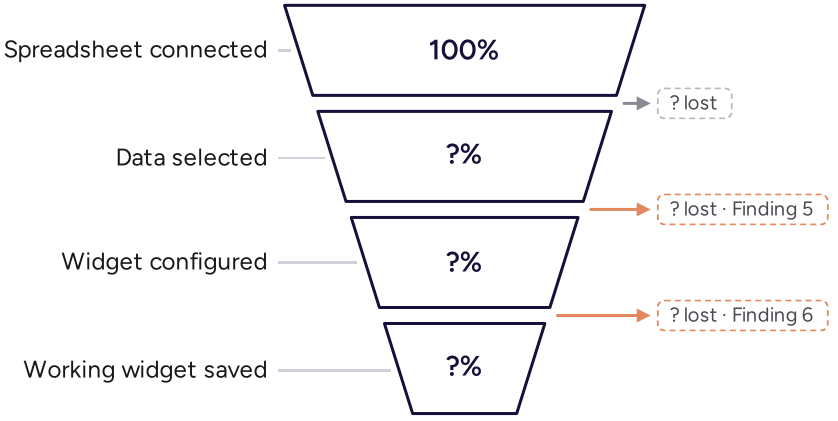
The "Connect your data" screen invites users to contact customer support if their data source isn't in the list, so they know who to ask.

Next step

VALIDATE WITH REAL DATA

Check the findings against product analytics: how many trial users who connect a spreadsheet go on to save a working widget, and where between those two points they drop off.

USER DROP-OFF AT EACH STEP Illustrative. Your analytics supply the numbers.



Happy to walk your team through these findings in 15 minutes.

USABILITY PRINCIPLES REFERENCED

Jakob Nielsen's 10 Usability Heuristics for User Interface Design, Nielsen Norman Group nngroup.com/articles/ten-usability-heuristics

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