

Usability Evaluation Instructions

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1. Decide how you want to measure success. What do you want the user to do? How will you know if they're successful?
 - a. Intuitive design – how easy is it for them to figure out what to do on their own
 - b. Percent correct answers OR actions you want them to take (effectiveness)
 - c. Time to complete task (efficiency)
 - d. Satisfaction (measure now and then after you “improve” the thing)
2. Identify who your users are
 - a. Adults or children
 - b. Your peers (CRM professionals) or laypersons
 - c. People with some level of existing knowledge or not
 - d. Native English speakers or not
 - e. Computer/tech savvy or not
3. Establish a user profile(s) for the evaluation, by role or by demographics
4. Determine your users' goals (not what you think they should be) by asking them
 - a. Contextual interviews with individuals – puts them in a real-life situation; ask questions as they interact with the product; ask them to complete tasks
 - b. Focus groups – about two hours of discussion led by a moderator with specific questions to ask
 - c. Use both of those qualitative methods to figure out what the goals might be, and then use surveys to quantify the extent to which each potential goal is true for a larger population
5. Design the evaluation. Only test what you want to measure (effectiveness, efficiency, satisfaction); don't ask them to do other things
6. Create the materials you need to do the evaluation
 - a. Materials for the user – whatever they would use in the real-life scenario, plus a satisfaction survey at the end
 - b. Materials for the evaluator – Checklist of information we wanted them to find, how long it took to find it, space for questions they asked; other notes. One sheet per participant.
7. Recruit at least five (5) participants. You might need five for each type of user if they are really different. Schedule plenty of time – at least twice as much as you need, plus travel if you have to go to them. Hold the evaluation in a realistic location for that task.

8. Conduct the evaluation

- a. Read a statement that says they are not being evaluated, they are doing the evaluation and can stop any time they want. They can ask questions.
- b. Record video, if they give you permission.
- c. Ask them to “think aloud” (narrate what they’re thinking as they go)
- d. It’s okay to help them if they get stuck, but you might want to decide ahead of time how long you’ll let them be stuck before you help.
- e. Don’t worry about measuring time during the eval, do that after using the video
- f. At the end, it’s okay to tell them what you were hoping they would do and find out what got in their way
- g. Satisfaction survey should focus on the task: how easy was it, what would have made this experience better for you, etc.
- h. Talk that over after they fill it out and ask questions if you have any.
- i. Show video clip

9. Analyzing the data

- a. Go back and take notes while watching the video
- b. Compare those with your notes from during
- c. Compare your notes from each of the evals
- d. What patterns do you see emerging? What did everybody do well/get right, or struggle with? Was there a place where people got tripped up? What are you seeing/hearing? This is pretty easy because you don’t have a lot of evals to process.
- e. Other people can help you with this. They may see something that you don’t.
- f. Quantify as much of these findings as you can. That helps you see other patterns and having numerical data can also help you convince others that something needs to be improved.
- g. Are there relationships between different variables?
 - i. For example, I determined that people were not finding the information they needed in the guidelines, in an order that made sense based on how they accessed the reference material. They had trouble finding information about windows, because it was in several locations.
 - ii. We concluded that we needed to reorganize the document to make clear where different kinds of information was located.
- h. Based on what you’re seeing, what are your conclusions?
- i. Questions about this part?

10. After you make the changes, you need to run the test again

- a. For a fresh look, use different participants.
- b. You can additionally use the same participants and get their feedback on the changes.

Usability Study Process and Materials Checklist

Study planning

Recruit participants

- ☐ Create recruiting materials:
 - ☐ User profile/personas based on user research
 - ☐ Recruitment criteria from user profile/personas
 - ☐ Schedule and participant background
 - ☐ Recruiting screener
 - ☐ Recruitment, confirmation, and reminder emails
 - ☐ Consent to record (to be included with confirmation email)
 - ☐ Thank you notes and package honorariums for participants
- ☐ Recruit participants (allow at least 2-3 weeks for this process)
- ☐ Send confirmation invitations (including consent to record) to participants and team members for:
 - ☐ Walkthrough (someone internal to the organization)
 - ☐ Pilot test (outside participant from target audience group)
 - ☐ Usability test (outside participants from target audience group)
- ☐ Make arrangements for user participant gratuities

Plan test

- ☐ Schedule meeting room(s) or remote meeting software for setup, testing, and participant debrief / waiting
- ☐ Assign roles to team members:
 - ☐ Facilitator
 - ☐ Note taker(s) – may want to have one to take notes on what the users say and one to take notes on the paths they take looking for information
 - ☐ Observer caretaker (this person explains expectations/directions to the observers and facilitates a discussion with them, if necessary, after they observe each session)
 - ☐ Video editor (in case video clips are required)
 - ☐ Recruitment manager
- ☐ Complete study planning spreadsheet:
 - ☐ Research questions
 - ☐ Measurable business goals
 - ☐ List of user tasks based on user research
 - ☐ Scenarios based on user tasks, business goals, and research questions
 - ☐ Pre- and post-study questions
- ☐ Determine the criteria for measuring the success of each scenario

- ☐ Complete study script (compile from study planning spreadsheet):
 - ☐ Facilitator intro and think out loud protocol
 - ☐ Pre-study questions
 - ☐ Scenarios (including scenario wording, answer, pathways, and research questions to be addressed for each scenario)
 - ☐ Post-study questions
- ☐ Set up select pre/post test questions in survey software (if necessary)

Schedule observers

- ☐ Create list of rules for observers
- ☐ Send invites to observers; include brief description of test process and rules for observers
- ☐ Schedule observers to attend the usability test session(s) and note the names on the daily schedule for reference

Gather materials

- ☐ Assemble materials for participants:
 - ☐ Consent form to sign (in person only)
 - ☐ Pre/post test questionnaires (in person only) or links to applicable surveys
 - ☐ Participant version of scenarios (so they can refer to them during the test) (in person only)
- ☐ Assemble materials for observers:
 - ☐ Study script (facilitator script, scenarios, pre/post questions)
 - ☐ Rules of behavior for observers
 - ☐ Note taking forms for observers
 - ☐ Success criteria
- ☐ Assemble materials for study team:
 - ☐ Study script (facilitator script, scenarios, pre/post questions)
 - ☐ Note taking form for facilitator
 - ☐ Note taking spreadsheet for note takers
 - ☐ Success criteria
 - ☐ Issue tracking spreadsheet
 - ☐ Participant names/emails/phone numbers (remote only)
 - ☐ URLs for surveys that you'll need to place in the chat window (remote only)
 - ☐ Call in number for team to debrief after each session (if team is not collocated)

Set up testing environment

- ☐ For in person tests:
 - ☐ Create "Do Not Disturb" signs
 - ☐ Be sure screen capture/camera set up works properly
 - ☐ Ensure observer's room screen cast works properly
 - ☐ Check supplies for test room (pens, paper, refreshments for participants)
 - ☐ Ensure observer room has adequate chairs, table space, office supplies, etc. for observers scheduled to take notes
 - ☐ Print copies of all study materials
- ☐ For remote tests:

- ☐ Set up in a quiet location
- ☐ Use a land line and head set so your hands are free for taking notes
- ☐ Print copies of all study materials
- ☐ Facilitator should:
 - ☐ Put your cell phone on vibrate and within reach in case observers or the participant needs to reach you
 - ☐ Have email open and minimized, in case you need to communicate with the participant
 - ☐ Get a glass of water
- ☐ Note takers should:
 - ☐ Set up your workspace (2 monitors, or 2 computers - one with virtual meeting software and one with note taking spreadsheet)
 - ☐ Get a stop watch and be sure it's working.

Walkthrough and pilot test

- ☐ Send out reminder email to walkthrough and pilot test participants the day before the session; copy team
- ☐ Review test objectives, success measures, and areas of concern with note takers
- ☐ Verify set up of testing environment
- ☐ Conduct walkthrough
- ☐ Revise test materials as needed based on walkthrough
- ☐ Conduct pilot
- ☐ Revise test materials as need based on pilot test
- ☐ Check lab supplies and replenish as needed

Usability test

- ☐ Send out reminder email to test participants the day before the session; copy team
- ☐ Verify set up of testing environment
- ☐ Conduct tests
- ☐ Debrief with team after each session and capture key positive findings and usability issues on the issue tracking spreadsheet
- ☐ Debrief with observers
- ☐ Post all videos to predetermined location

Data analysis

- ☐ Work with team to determine final list of positive findings, usability issues
- ☐ Work with team to develop recommendations for improvement
- ☐ Choose video clips that illustrate your main findings
- ☐ Prepare summary of findings and recommendations; include video clips
- ☐ Present and distribute summary of findings and recommendations
- ☐ Send thank you notes

Consent & Recording Release Form - Adult

I agree to participate in the study conducted and recorded by the [Agency/Organization].

I understand and consent to the use and release of the recording by [[Agency/Organization]. I understand that the information and recording is for research purposes only and that my name and image will not be used for any other purpose. I relinquish any rights to the recording and understand the recording may be copied and used by [Agency/Organization] without further permission.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator.

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date: _____

Please print your name: _____

Please sign your name: _____

Thank you!

We appreciate your participation.

An Introduction to Testing *[With moderator interaction]*

Welcome and Purpose

Thank you so much for coming in today. I wanted to give you a little information about what you will be looking at and give you time to ask any questions you might have before we get started.

Today we are asking you to serve as an evaluator of a Web site and to complete a set of tasks. Our goal is to see how easy or difficult you find the site to use.

Test Facilitator's Role

I am here to record your reactions and comments of the Web site you will view. In a conference room nearby, I have a colleague helping me take notes and observe your interaction with the site as well.

During this session, I would like you to think aloud as you work to complete the tasks. I will not be able to offer any suggestions or hints, but from time to time, I may ask you to clarify what you have said or ask you for information on what you were looking for or what you expect to have happen.

Test Participant's Role

- Today I am going to be asking you to look for some information on the site and tell me how easy or difficult it was to find the information. These activities are all about how easy we have made it for people to use the site.
- There is no right or wrong answer. If you have any questions, comments or areas of confusion while you are working, please let me know.
- If you ever feel that you are lost or cannot complete a task with the information that you have been given, please let me know. I will ask you what you might do in a real-world setting and then either put you on the right track or move you on to the next scenario.
- As you use the site, please do so as you would at home or your office. I would ask that you to try work through the tasks based on what you see on screen, but if you reach a point where you are not sure where or how to find something, please feel free to use 'Search'.
- We will be recording this session for reference if needed. We are capturing your face, your voice and what you see on the screen. Your name will not be associated or reported with data or findings from this evaluation.
- I may ask you other questions as we go and we will have wrap up questions at the end.

Do you have any questions before we begin?

What to Test/Notetaker's Guide

Date(s):
[Dates of test sessions]

Location:
[Address]
[Room Number]
[City, State]



What to Test/Notetaker's Guide for [Site]

Notetaker _____

Date _____

Location _____

Participant # _____ Time _____

Web Site: [URL]

Purpose

The purpose of this test is to learn how well a representative sample of [target audience] can interpret and use the [site]. Areas of the site that will be evaluated for performance and overall user satisfaction include the: architecture, navigation, terminology, and its ability to meet expectations.

Introductory Questions & Tasks

[You may wish to customize this section for general questions about your site]

- Have you heard of [site]? _____ Yes _____ No
If so, tell me what you know about them.
- Bring the test participant to [site]. **Ask:** "Just from looking at this site, what kinds of information do you think you could get from this site? Please be specific."
- Who do you think this site is designed for? Why? (*Probe: public, health professionals, etc.*)
- Who manages this site?

Scenarios

[Three are presented here; you may wish to add another 7-10 scenarios.]

Scenario 1 – Exercise/Sports; Fitness

You’ve heard that many people get injured due to bike accidents. You want to know if wearing a bike helmet will reduce your chance of injury. Where would you look for this information?

Pathway(s)	Success (Circle 1)	Notes/Observations
Safety and Wellness→ Exercise/Sports→ MLP – Sports injuries OR Safety and Wellness→ Safety→ HF – General OR [Add more as needed]	0 Not completed 1 Completed with difficulty or help 2 Easily completed	(Note why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology)

Scenario 2 – Diseases & Conditions

You want to create a diabetes education program at your organization to increase awareness about what diabetes is and how to prevent it. Where would you get this information?

Pathway(s)	Success (Circle 1)	Notes/Observations
Diseases & Conditions→ CDC Health Topics A-Z OR Healthfinder→ [term] OR [Add more as needed]	0 Not completed 1 Completed with difficulty or help 2 Easily completed	(Note why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology)

Scenario 3 – Self-Directed Activity

Now, we'd like to hear about how you might use this site. Please identify an item that you would be interested in finding on this site. Please state your question and then search for the answer. Let me know when you've found the information.

Write the participant's question:

Pathway(s)	Success (Circle 1)	Notes/Observations
n/a	<p>0 Not completed</p> <p>1 Completed with difficulty or help</p> <p>2 Easily completed</p>	(Note why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology)

[You may wish to add another 7-10 scenarios.]

Exit Questions/User Impressions

[You may wish to customize this section for general questions about your site]

- What is your overall impression to [site]?
- What is your impression of the search capability?
- Do you feel this site is current? Why?
- What did you like best about the site?
- What did you like least about the site?
- If you were the website developer, what would be the first thing you would do to improve the website?
- Is there anything that you feel is missing on this site? (*Probe: content or site features/functions*)
- If you were to describe this site to a colleague in a sentence or two, what would you say?
- Do you have any other final comments or questions?

