

Facilitating a Usability Test

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Topics we'll cover

- ▶ Test set-up
- ▶ 3 roles of the test facilitator
- ▶ Steps for running a usability test
- ▶ Tips and tricks for facilitating a usability test



Test set-up: lab



Test set-up: conference room

3 roles of a test facilitator

- ▶ Flight Attendant
 - Responsible for safety and comfort of participants
- ▶ Sportscaster
 - Responsible for “play by play” during the session
- ▶ Scientist
 - Responsible for test planning and reporting
- ▶ *Source: Carolyn Snyder’s “Paper Prototyping”*

Steps for running a test

- ▶ Pre-test briefing with observers
- ▶ Greeting user
- ▶ Interview user
- ▶ Distribute paperwork
- ▶ Conduct the test
- ▶ Q&A with user at end of session
- ▶ Review list of observations with observers

Pre-test briefing with observers

- ▶ One of the commonly missed steps in a usability test
 - Prevents any surprises at the end of the session
 - Sets the ground rules for observers
 - Gives observers an opportunity to understand the scenarios and tasks
 - Provides an overview of user's background

Greet the user

- ▶ The facilitator's role is to put the user at ease
 - Introduce user to observers
 - Answer any questions before starting the tasks

What to say

- ▶ We're *evaluating* the product, not you
- ▶ You're helping the design team learn what's not working
- ▶ You can take a break or stop at any time during the session
- ▶ Problems are not your fault
- ▶ Think aloud as you go through the tasks

Pre-test interview

- ▶ Ask about:
 - Relevant background information
 - Domain or tool knowledge
 - Experience with the product

Distribute paperwork

- ▶ Informed consent
- ▶ Pre-test questionnaires, if necessary

Complete tasks and scenarios

- ▶ Give users scenarios and tasks
 - Tasks should focus on business and user goals
- ▶ Can be written instructions or read aloud by facilitator
- ▶ Check for user understanding
- ▶ Observe users' behavior when interacting with the product

Maximizing data gathered

- ▶ Observe user's behavior and listen to responses
- ▶ Respond to silence or unclear vocalizations
- ▶ Summarize actions
- ▶ Ask user to clarify, when necessary

Important questions

- ▶ Common questions
 - *Can you say more about that?*
 - What did you expect here?
 - What are you thinking?
 - What does this mean to you?
 - What do you do next?

When users are struggling

- ▶ Balance the need to gather information and comfort the user
 - Move from general questions to more specific questions
 - Provide encouragement

Getting more specific

- ▶ What do you see here?
- ▶ What do you think you might do next?
- ▶ Do you see anything at the top of the screen that may help you?
- ▶ What do you think that link does?
- ▶ What about the link right here?

Provide encouragement

- ▶ Answer users questions
- ▶ Ask how the session is going for the user
- ▶ Assess whether user needs a break
- ▶ Be aware of how the user is feeling throughout the session

General Q&A

- ▶ How'd that go?
- ▶ How realistic were the tasks?
- ▶ What are two things you liked about the product?
- ▶ What are two things that can be improved with the product?

Debrief observers

- ▶ Involve observers as much as possible
- ▶ Create a rolling list of observations on a whiteboard
- ▶ At the end of each session, discuss the observations
- ▶ Discuss next steps

Thank you!

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