



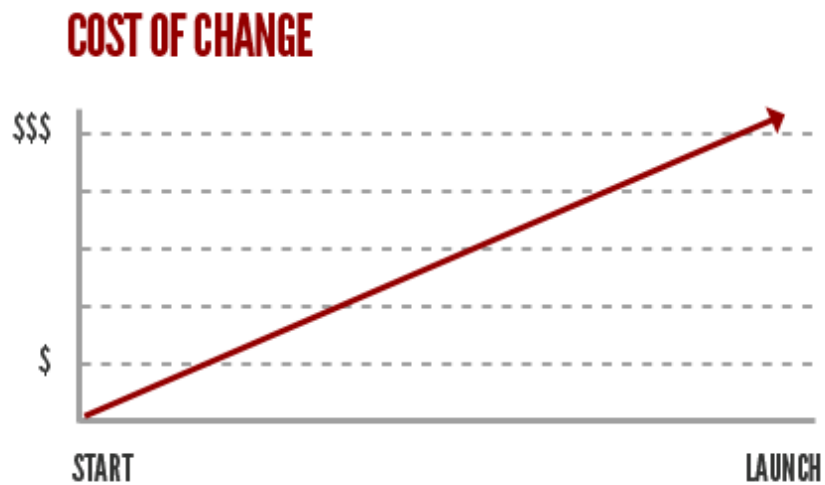
# A Guide for Usability Testing

User Experience for Small Business

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## A Guide for Usability Testing

Usability testing benefits everyone. Visitors benefit because the outcome makes the website or app is simple and understandable. Business benefit because they are able to sell more products or build a more loyal customer base. Even on internal sites and application usability testing can provide big benefits. By reducing frustrations and friction points employees become more productive, support costs go down and training isn't needed as much.



Usability testing does cost a little to conduct but the return greatly outweighs the cost.

# What Is Usability Testing?

At its core usability testing is evaluating how easy something is to use. That something can be almost anything, including software, tools or machines, smart phone or tablet apps or most commonly websites. With digital products such as apps and websites, usability has been defined as the ease at which people can use the app or site to achieve a goal they would typically do.

The most common approach to usability testing is directly watching and talking to actual people using the product.

## Common Uses of Usability Testing:

- Find problem areas and recommend changes
- Use throughout development and design to keep ideas on target
- Improve the overall satisfaction of a product
- Assess the strengths and weaknesses of design features
- Learn from your competitors

## When to Conduct Usability Testing?

Ongoing testing is best but depending on your goals there are different types of usability tests that you can use. Based on whether you want to develop something completely new, evaluate an existing product, or compare your site or app to your competitors.

- **Flow Testing:** Evaluate key flows (check out, registration, sign up, etc.) within your current site or application to learn where visitors are struggling. Then, fix the issues and make improvements to increase conversion rates, satisfaction scores or revenue.
- **Explorative Testing:** Conduct usability testing early in the design process to help identify what is working, what isn't currently working or to help assess a preliminary design idea. Use this testing early to help prove out ideas
- **Competitive Testing:** Compare two or more competitive sites or apps to identify what is working or what isn't currently working. Learn from their strengths and weaknesses to make your site or app better.

## 5 Key Steps

1. Set up your software and environment
2. Develop your tasks
3. Recruit participants
4. Run your test
5. Report back your findings

### 1. Setting Up

You don't need a fancy lab to conducting testing. Setting up a test can be very simple and informal. The goal is to get feedback on your website or app not on your testing setup.

Ideas for where to conduct usability test

- Small meeting room so you can test in a private without distractions
- Coffee shop
- Remote testing

Equipment and software

- Laptop
- Web cam
- Screen recording software
- Audio/video recorder
- Remote testing software (if necessary)

Miscellaneous

- Notebook
- Pens / Pencils

Mobile testing can prove to be a little more challenging but with some planning it can also be done using the above set up (learn how to create a mobile testing rig).

## 2. Develop Your Tasks

Think about what you want to test. The easiest way to do this is to think about why a visitor is coming to your site and what you want them to do – this could be purchase a product, upload photos, engage with your content, etc. Write out the top five tasks you want the participant to perform.

After you have your tasks write a scenario for each task. You want to explain the task without telling the participant how to complete the task. For example, if you were testing the checkout flow of your website the scenario may be, “Imagine you wanted to purchase a new digital camera and found the one you like. You also have a 25% discount that you would like to use. How would you go about completing this?”

Create any follow-up questions you might have about each task. These may get answered during the task itself but if not it’s a good idea to have a list of things you’d like to learn. These additional questions can lead you down a road outside of the scenarios, but within the flow you are testing. The great thing about usability tests is how you often get insight into areas you hadn’t thought of.

### 3. Recruit Your Participants

Recruiting participants doesn't have to be difficult. You only need between 5-8 people to catch the majority of the usability problems.

The key to finding good participants is to *focus on the behavior you're testing not the demographics of the person*. In our example from above the behavior being tested is the process of purchasing a product online so you want to recruit people who purchase products online (if you were testing the details of the actual camera product page then you would want to recruit people familiar with cameras). Once you've identified the behavior being tested start by asking people you know – friends, colleagues, acquaintances (if they aren't able to help ask them to ask their friends). You can also talk to people at your local coffee shop or library or post an announcement at your local supermarket. Remember the key is to recruit for the behavior not the demographic.

### 4. Run the Test

After getting everything set it's time for testing. This is the fun part.

#### **Dry Run**

First, do a dry run. Test the entire testing process from start to finish with a colleague or friend. (It's embarrassing to find out on the first test that your script doesn't make sense.) Also important is to test the equipment. You want to work out any software or site kinks before testing with participants

#### **Live Test**

When your participant arrives and you've introduced yourself, let them take a seat behind the computer. Briefly explain what will happen and reassure them that they are not being tested but

instead it is the site or app that is being tested. Any problems aren't their fault and there are no wrong answers.

Give the participant a scenario and clarify any questions they have about what you would like them to do. It is important not to guide them in a particular path but to just clarify the task. Ask them to think out loud so you understand what they are thinking. As they are talking make sure you're taking notes as they complete each task scenario.

You'll be testing three or five tasks with each user which usually takes about 30 minutes. Tests that run 30 – 45 minutes are best 60 minutes at most. Participants will start getting bored about an hour into the session and feedback that is provided is less valuable as time goes on.

Remember do not guide the user. Explain what they need to do but do not use the exact phrase contained on the site. For example, instead of saying "click the add to cart button" say "how would you continue". It's important to understand that terminology used on the site is being tested along with the design, forms and navigation.

Encourage the participant to 'think out loud' and tell you what they are thinking. Let them talk without interruption once they start they'll tell you all kinds of things. I find it best to let them go through the complete task first without stopping and then go back and follow up on anything they may have done. Open-ended questions are best. The following questions can get the most information:

- What did you expect to happen when you did that?
- What do you think will happen when you do that?
- What are you looking for?
- What are you trying to do?



Each session should be recorded with some kind of screen recorder. I use Morae which is designed specifically to record usability sessions but it is a little expensive if you're not planning on using it a lot (\$1,495 USD). You can use a free tool such as Camstudio ([www.camstudio.org](http://www.camstudio.org)) or something you may already own like WebEx. If recording isn't possible forget it, just take notes using pen and paper. The tools are not what's important – listening to people is more important than the tools you use.

After testing, give the participants their incentive (if necessary) and thank them for their efforts. Save the screen recording and reset for the next participant (if necessary).

## **5. Report Your Findings**

After all your sessions are completed you can analyze the data. Start by going back through your notes and pulling out key phrases, observations and issues.

Review the videos, if recorded, and create highlight clips. This is especially helpful if you are trying to change somebody's mind. If you are trying to build a case to get changes made highlight comments that emphasize the problems.

Look for and identify patterns. Hearing feedback from only one participant about a particular issue usually is more of a preference for that particular person. If, on the other hand, two or three participants echo close to the same thing then that is a good indication of a usability problem that will need to be looked at closer.

These findings are subjective so use the notes and recordings as discussion starters. Discuss the observations with other people in your organization (colleagues, stakeholders, management, etc.) and see what conclusions they come to.

Once you have come to your conclusions and have implemented changes it is time test again. Testing is never a one-time thing. I've tested projects as much as every two weeks over a three month time period. The more you test the more you learn. The more you learn the more you can refine your product.

### **About Craig Kistler**

Craig Kistler has delivered user experience insights and strategies to major global web properties and guided the user experience decisions for companies that have websites with millions of unique monthly visitors. He can help you assess your website's performance, and has assembled these guidelines to help you better understand your website and how to make more money.

