# 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