

Conduct a usability study

Observe a mock usability study

Explore usability study best practices

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Video: Explore usability study best practices: Before the study begins

4 min

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Video: Explore usability study best practices: During the study

2 min

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Reading: Learn more about usability study best practices

20 min

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Practice Quiz: Test your knowledge on usability study best practices

3 questions

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Video: Deana - My job as a UX researcher

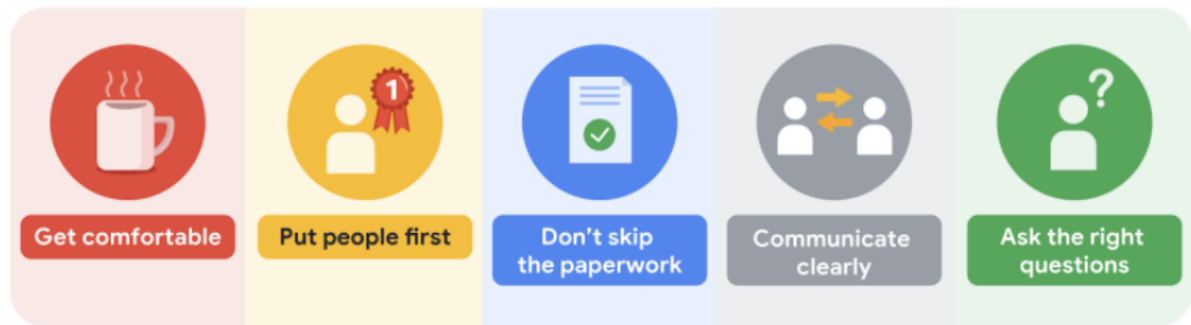
2 min

Identify biases when interviewing participants

Use note-taking methods during usability studies

Week 2 review

Learn more about usability study best practices



A usability study is at its best when participants come from diverse backgrounds and have varying abilities. The unique life experiences, perspectives, identities, and abilities of participants will inform the feedback they provide about your designs. Your goal is to create designs that work for all types of users, so learning from a diverse pool of research participants is key. Before you conduct your first usability study, keep these five best practices in mind: get comfortable, put people first, don't skip the paperwork, communicate clearly, and ask the right questions.



Get comfortable

Participants in a usability study provide the best feedback when they feel comfortable with the moderator, which could be you or one of your team members. Starting with **getting-to-know-you small talk** can make it easier for participants to feel comfortable and open up, both in person and virtually. You want to establish a professional-but-friendly rapport with participants right from the start. Here are some good questions to kickstart the conversation:

- How is your day going?
- Did you have an easy time getting here (or signing on)?
- Can you tell me a little bit about yourself?
- Do you have any favorite hobbies?

These questions help participants start to engage with the moderator, which can make sharing their perspectives about the product more natural, too. Remember to tailor the ice-breaker questions to the types of participants in your study. For example, if your study participants are minors or children, you might want to add an engaging and entertaining activity to begin the study.

Then, **thank participants for coming**. Communicate how grateful you are that the participant is taking the time to participate in the study.

It's also helpful to remind participants that they should be **open and honest** about their experience, so the design team can make improvements. To get the most useful feedback about the product you've designed, let participants know that you're here to find out how to improve the design, so constructive criticism is more than welcome.

Finally, make sure the **space** you're conducting the study in is physically comfortable. Usability studies can take place in a usability lab, inside someone's home, in a public area, or online. Each one requires a different setup to ensure participants are feeling at ease and properly accommodated.

- A **usability lab** is a place with equipment for conducting a usability study, like screen recorders, eye-tracking devices, and computers or mobile devices set up specifically for testing.
- If you're conducting the usability study in someone's home or in a public area, find a place that's as clear of distractions as possible.
- For usability studies conducted online, communicate whether you're recording the participants or their screens, and let them know that the recordings will only be used for research related to your test.



Put people first

Throughout a usability study, you want to use participants' preferred pronouns and identifiers (like he, she, or they), pronounce their names correctly, use the correct courtesy titles (like Mr., Ms., Mrs., Captain, or Dr.), and ask whether they have any other communication preferences. Giving participants the chance to tell you how they want to be addressed puts the person first. In addition, this helps you get in the right mindset of what a usability study is all about: how people interact with technology.

When engaging with participants who use an interpreter, always address your comments and questions directly to the participant, instead of to the interpreter. Looking at the participant and speaking directly to them is the best way to make sure you understand how the participant is experiencing your product.

When engaging with participants of different backgrounds and abilities, **use people-first language**. Literally! Put "people" or "person" first in your phrasing. For example, you should say "person with a disability" instead of "disabled person."

Keep in mind: Marginalized communities are often not included in research studies, which means designs often don't address their specific needs. Remember, **marginalized communities** are ones where people have specific characteristics and life experiences that prevent them from fitting into what society inaccurately defines as "normal". Because of this, the experiences of users from marginalized communities are sometimes not considered in the research planning of UX designers.

The definition of which people fit into a marginalized community changes depending on the context. For example, when designing a tool like a kitchen gadget, you may want to consider if the design supports users who are left-handed. Including their perspectives and unique pain points in your research would help generate new insights. It's important to formally commit to diversifying your group of study participants. Your product will benefit too! Incorporating feedback from marginalized communities in your designs will inevitably yield better insights.



Don't skip the paperwork

Once you've made participants comfortable and started getting to know them, you need to take care of some paperwork. Ask participants to sign a **nondisclosure agreement** (NDA), which informs participants that they can't talk about your product or the usability study publicly. If the NDA is set up correctly, it helps build trust with participants and increase rapport. You should keep this document in your records because it protects confidentiality and your intellectual property. If your study participants are minors, their parents must consent to the child's involvement in the study.

Participants also need to sign paperwork to **allow their session to be recorded**. You might record a usability study session through a paper note sheet, screen recorder, video recorder, or audio recorder. Recording sessions makes it easier to turn observations into insights later, but participants will need to be aware of this process and provide consent.



Communicate clearly

Now, with all of the logistics taken care of, you're ready to begin the study. **Explain the focus of the study** and what participants will give feedback on. Give the participant a roadmap or preview of what's to come during the session. Be sure to ask the participant if the study you've explained will be okay with them before proceeding.

You'll want to introduce the **think-aloud method**, which is a type of data gathering that has participants turn their internal thoughts into shared ideas through spoken, signed, or typed words. When you use the think-aloud method, participants explain what they're doing while they're completing tasks. This gives you, as the researcher, an opportunity to record exactly what participants are thinking about a product, in addition to what you observe them doing during the study. With this method, it's crucial that participants know that they can be honest; they can't offend you because their observations are helpful to improving the designs.

Also, **remind participants that they are not being tested**. The goal is to understand how the user is experiencing your product, so there's no right or wrong answer! If the participant can't complete a task, that isn't a reflection of their personal abilities; it's a reflection of the design's usability.

If you're ever unsure about the feedback participants are sharing, try to **summarize their ideas for confirmation**. Repeat back what you *think* the participant means, and encourage them to correct or confirm the statement.



Ask the right questions

When it comes to usability studies, the questions you ask and the ways you ask them directly impact the insights you uncover. Sometimes the best nuggets of information come from a participant building on a point or clarifying themselves, rather than directly answering one of your questions. Here are a few pro tips to help you ask the right questions during a usability study:

- **Use the same set of questions with each participant.** Usability studies typically focus on one person at a time, so you want your conversations with each user to be about the same design features. Keep your research consistent.
- **Ask open-ended questions.** Avoid asking "yes" or "no" questions. Instead, ask questions that start with "why." This will allow for more detailed feedback and might reveal useful information you can later include in your product.
- **Encourage elaboration.** Sometimes, the script of questions you pre-wrote while planning the study isn't thorough enough. Ask follow-up questions if you need to dig deeper. Maybe something unexpected came up and you want to explore it, or you didn't get enough information from a participant's first response and need them to elaborate. If you're unsure how to ask a follow-up question, the phrase "tell me more about that" usually works.
- **Ask the same question from different angles.** Interviews can be awkward, so it might take awhile before you find out what participants really think. You can prepare for this delay by asking the same question from multiple angles. For example, you might ask, "How often do you go to the grocery store?" at the start of the interview; then, "How many times per week do you go to the grocery store" in the middle of the interview. The participant might give you a more detailed answer the second time around, which can help you get more accurate insights and useful data.
- **Don't mention other participants.** Talking about other participants can lead to privacy violations and skew the answers of the participant you're with, which leads to inaccurate data.
- **Don't ask leading questions.** Be careful about how you word each question. Participants can pick up on your preconceived notions if your questions are worded in a biased way. For example, if you ask, "Why do you think apples are more popular than pears?" then the participant is primed to answer positively about apples and negatively about pears. Instead, try asking a more neutral, open-ended question, like: "Do you prefer apples or pears, and why?"

You're ready to get started!

Keeping these best practices in mind will put you well on your way to conducting your first moderated usability study. By helping participants feel comfortable, putting people first, double checking all of the paperwork, communicating clearly, and asking the right questions, you'll set yourself up to have a high-quality study that leads to lots of insights. You're ready to discover how people experience the product you've designed!

Mark as completed

