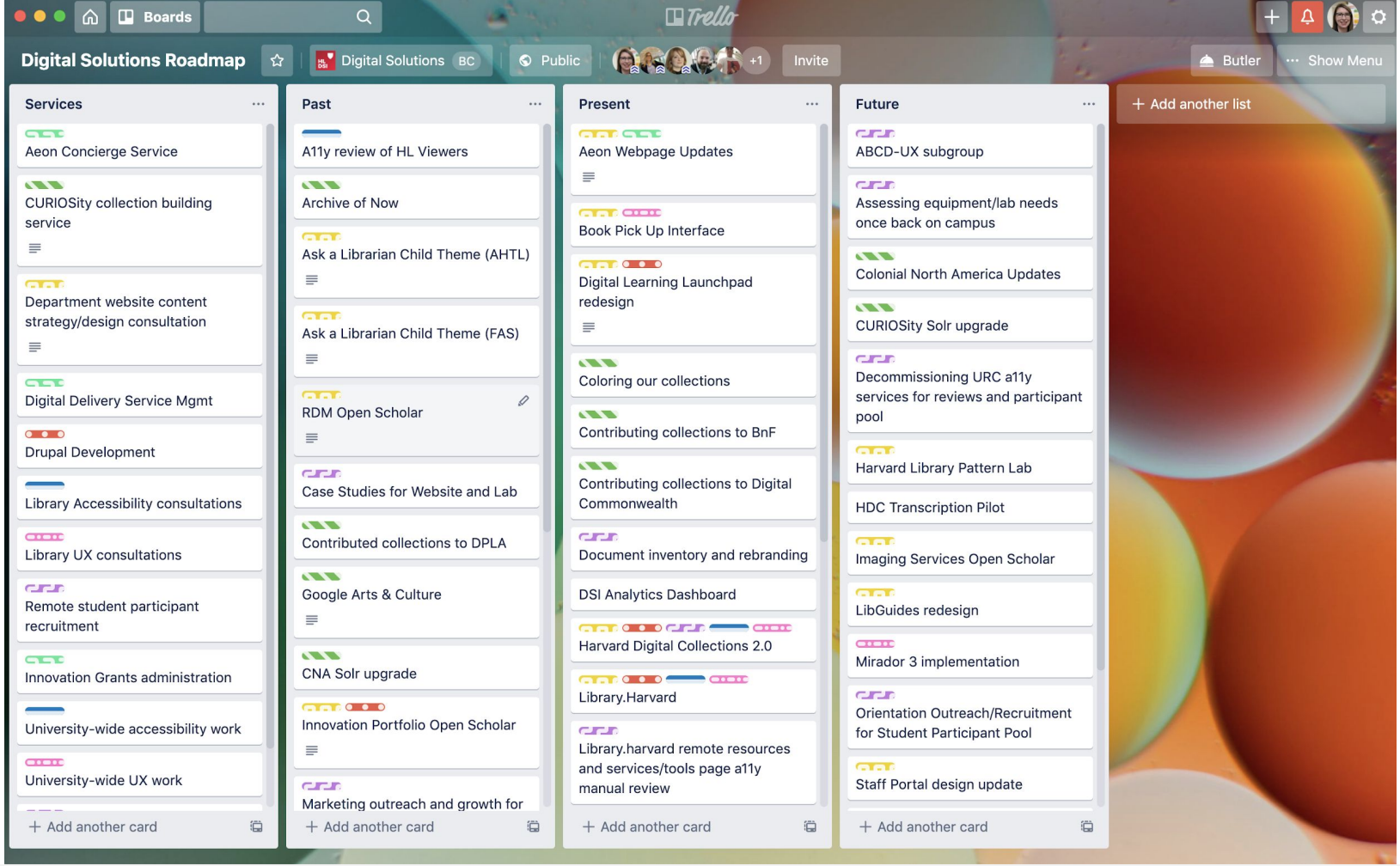
Usability Testing 101 & Remote Moderator Best Practices

Fall 2020

Usability has 5 quality components

1. **Learnability** How easy is it for users to accomplish tasks the first time they visit the site?
2. **Efficiency** Once they have learned the design, how quickly can they accomplish tasks?
3. **Memorability** When users return to the site after a period of not using it, how easily can they establish efficiency?
4. **Errors** How many errors do users make? How severe are they?
5. **Satisfaction** How pleasant is it to use the design?

Usability IRL featuring Trello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CURIOSity collection building service
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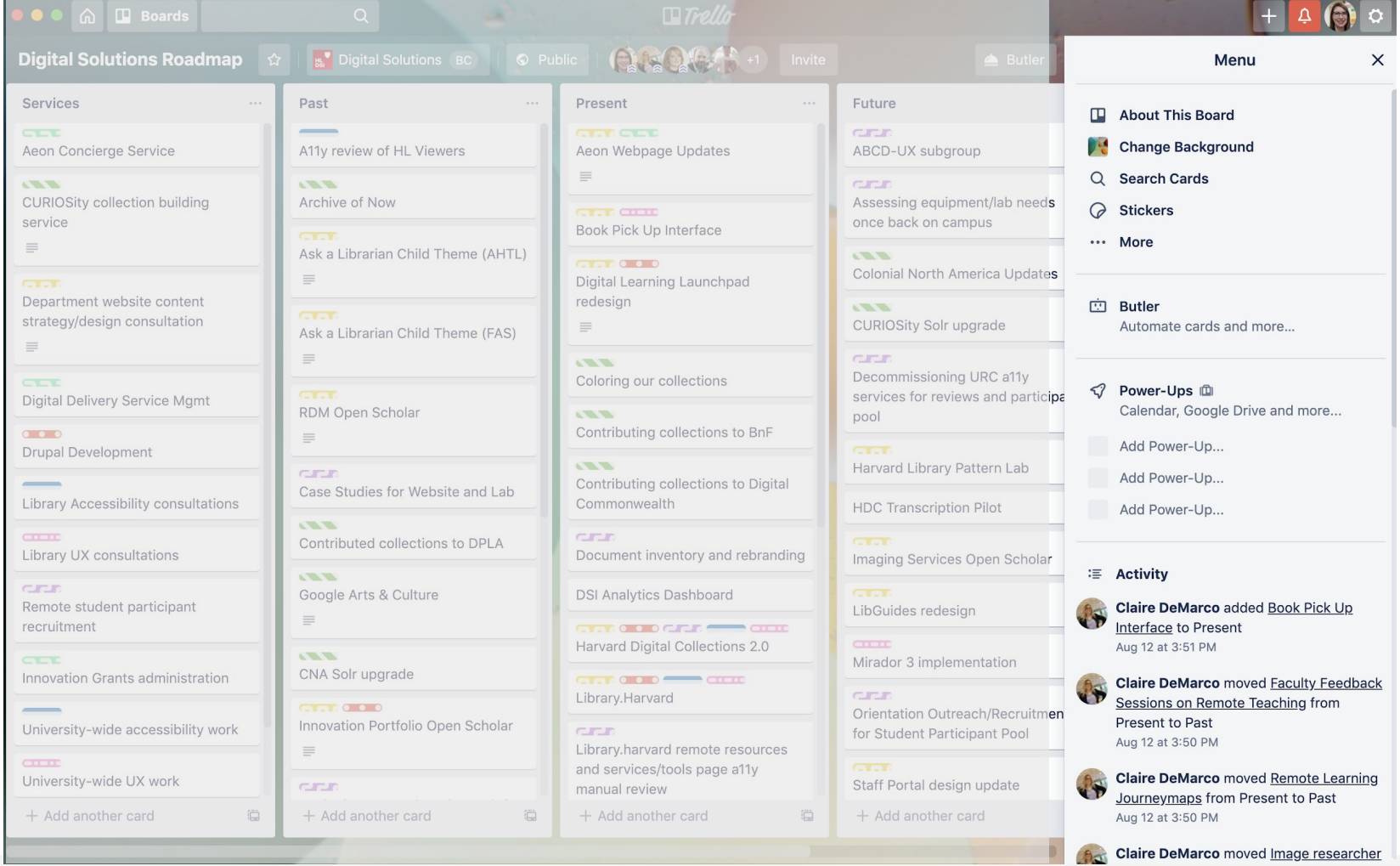
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Automate cards and more...
Power-Ups
Calendar, Google Drive and more...
Add Power-Up...
Add Power-Up...
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Activity
Claire DeMarco added Book Pick Up Interface to Present
Aug 12 at 3:51 PM
Claire DeMarco moved Faculty Feedback Sessions on Remote Teaching from Present to Past
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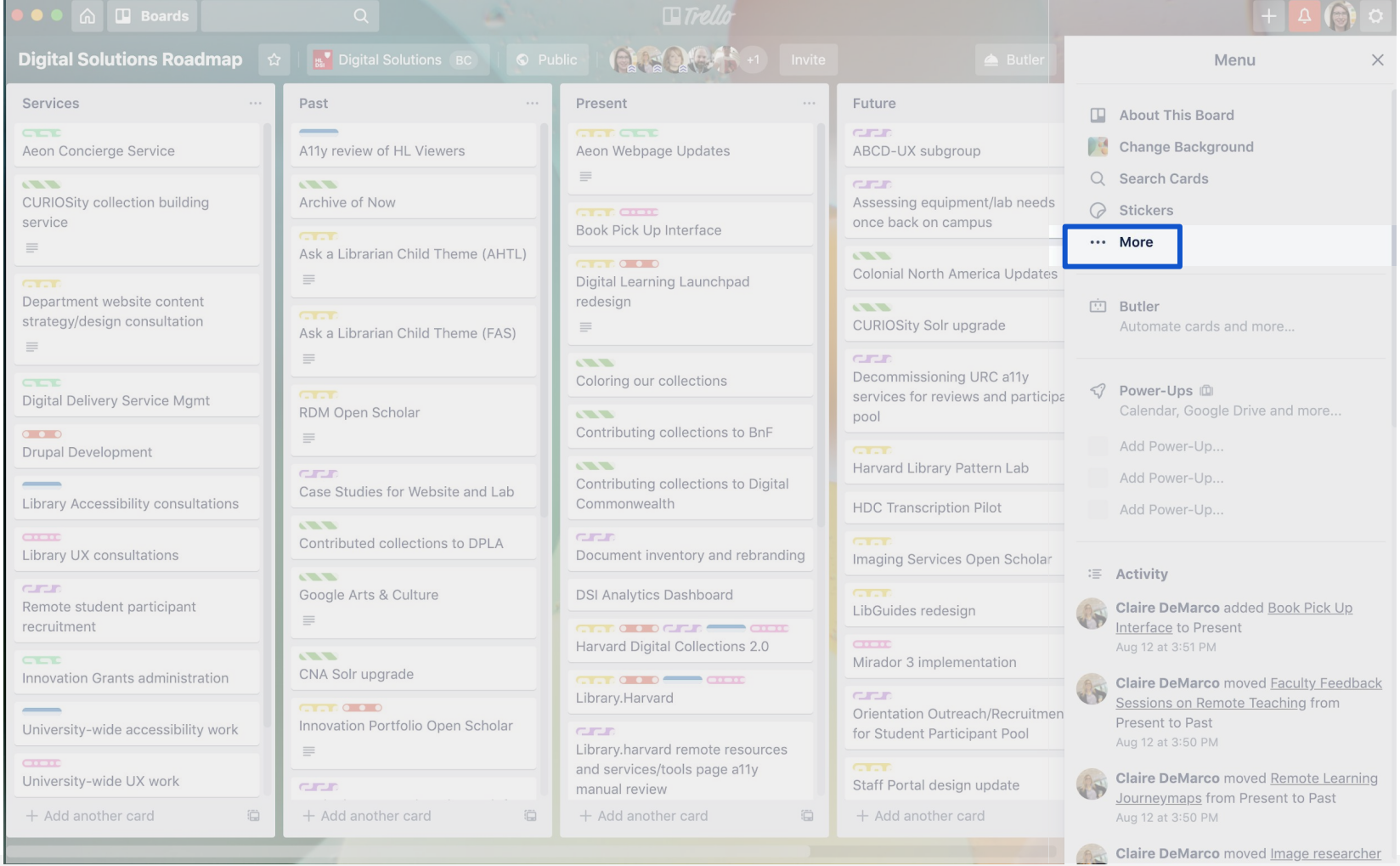
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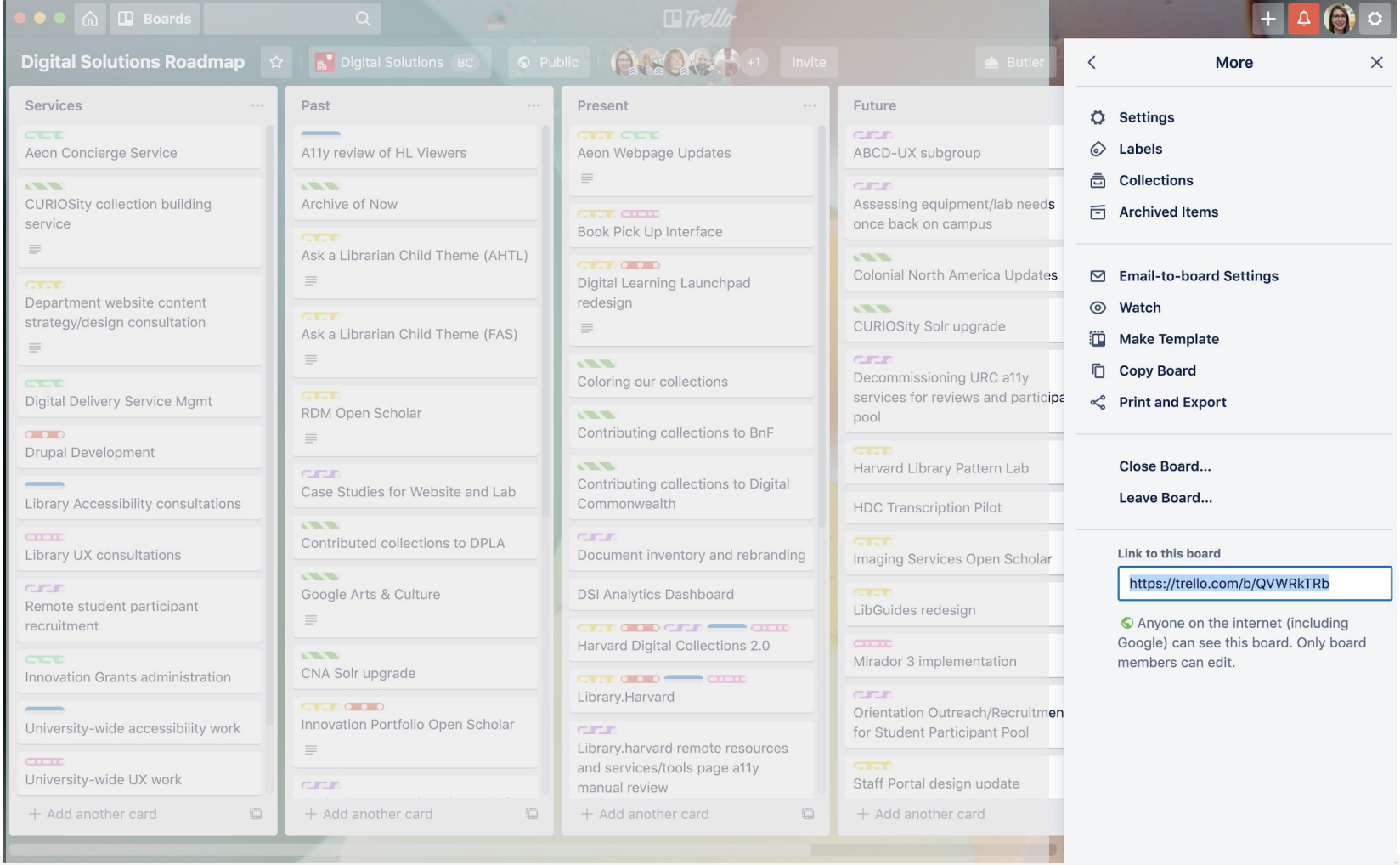
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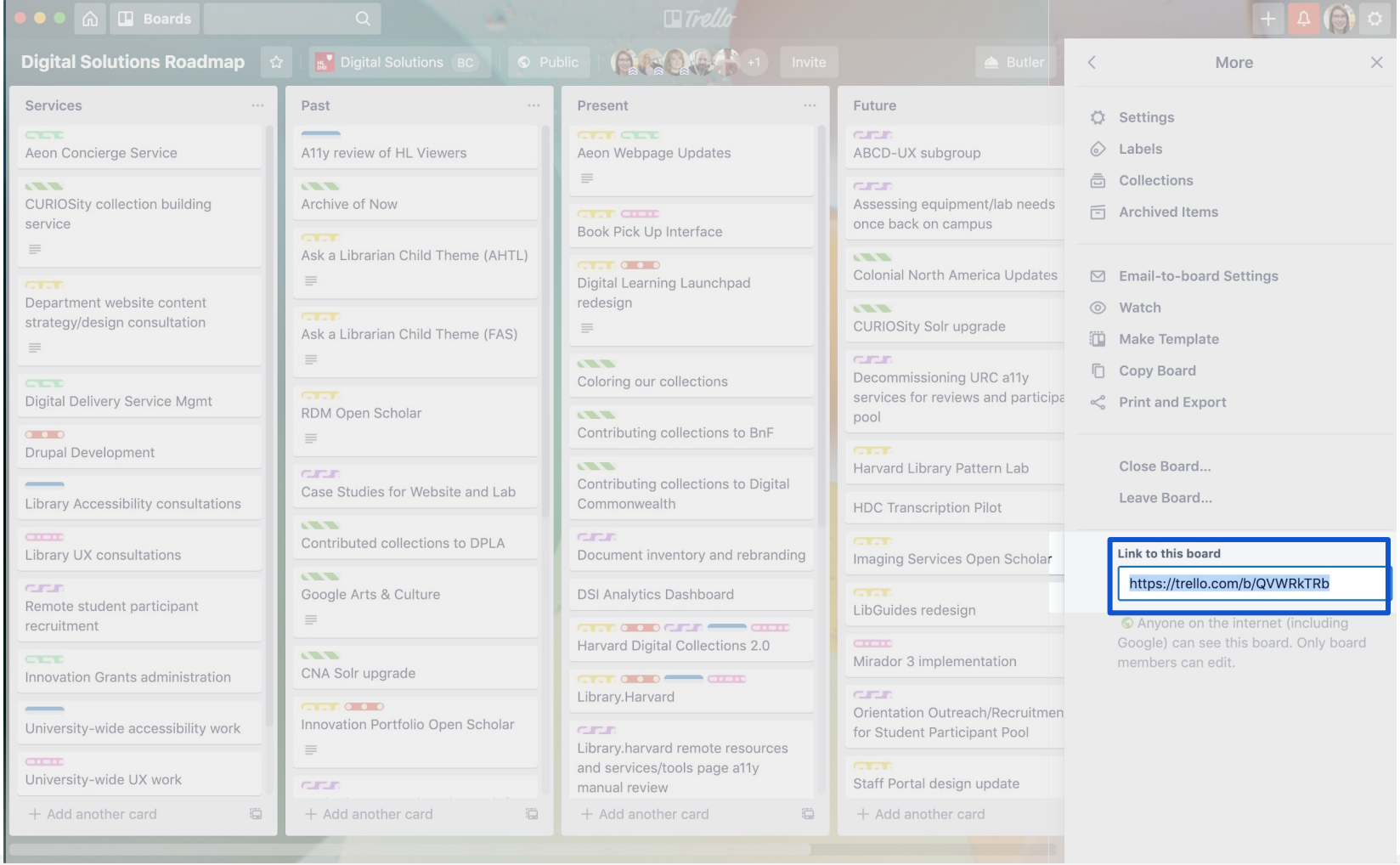
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5. **Satisfaction** How pleasant is it to use the design?

Usability testing

When to use

- Understand how people experience a website by observing them use it to complete basic tasks and narrate their actions aloud.
- Testing can be done in-person (formal or informal) or remotely via Skype.
- Moderated versus un-moderated testing options.

Usability testing

When NOT to use

- Feedback on design(s).
  - *Paper prototype* instead.
- Determining what users need from a new system.
  - *User interviews* instead.
- Need a wide representation of audience or qualitative data.
  - *Survey or analytics* instead.

Types of Usability Testing

1. **Formal** In lab or office setting. Recruiting is done prior to test and participants are scheduled. Good recording quality; more time for questions; recruiting can be a hassle.

2. **Informal** At a café, lobby, or any area with high foot-traffic. Recruiting is done on-the-spot. Less time with participants; easier recruiting.

3. **Remote** Testing done via Zoom. Recruiting is done prior to test; tasks are can be read or sent via chat one at a time.

Types of Usability Testing

1. **Unmoderated** Participants follow instructions on a screen to initiate recording, complete tasks and answer questions.

2. **Moderated** A human moderator (maybe you!) guides participant through tasks and asks questions, while remaining impartial and avoiding leading the participant.

Moderators & note takers

- For moderated testing you need 1 moderator.
- It's VERY DIFFICULT to successfully moderate and take notes at the same time. Focus on being a great moderator. Then take notes from the recording after the session.
- If you choose not to record, you may want to have a note taker present, but it can make the participant uncomfortable to be outnumbered. *Note takers should keep their video off after a short introduction*.

Participants

- If you are doing a task-based usability test you only need to test with 5-7 users.
  Always over-recruit, in case of no-shows and outliers.
- For sites with wide audiences, test with 5-7 users from each user type or persona.

Who is your audience?

Recruiting from URC Pool

- Over **300** graduate & undergraduate students
- Can recruit **by concentration or affiliation**
- Recommend **incentives** like $15 Amazon gift cards (check with your finance department!)
- Use **Calendly** to manage sign-ups
- Email libraryux@harvard.edu to request participants.

Recruiting Email

HARVARD LIBRARY

Harvard Library needs your help.

Harvard Library is working to understand how to enhance a library website that supports remote research. We're holding 30-minute online interviews via Zoom on Wednesday, July 29th. We want to hear from you!

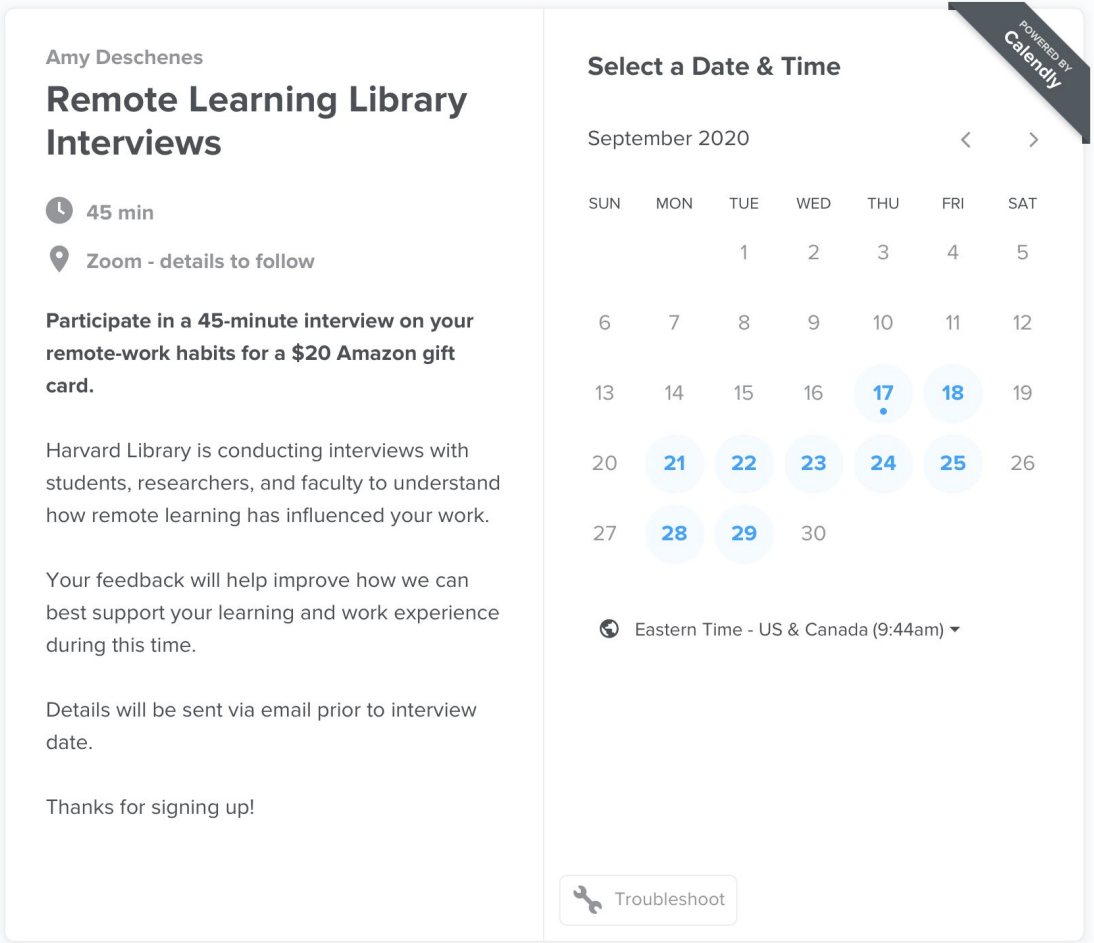
Take part in a 30-minute interview on digital learning resources with Harvard Library in exchange for a $15 Amazon gift card.

We will ask you to share your screen for a portion of the interview, so please plan to join us with your computer rather than your phone.

Sign up for a session now!

Can't make the available times, but still want to participate? Email amy_deschenes@harvard.edu to coordinate a time.

Calendly


Amy Deschenes
Remote Learning Library Interviews
45 min
Zoom - details to follow
Participate in a 45-minute interview on your remote-work habits for a $20 Amazon gift card.
Harvard Library is conducting interviews with students, researchers, and faculty to understand how remote learning has influenced your work.
Your feedback will help improve how we can best support your learning and work experience during this time.
Details will be sent via email prior to interview date.
Thanks for signing up!
Select a Date & Time
POWERED BY Calendly
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Eastern Time - US & Canada (9:44am)
Troubleshoot

3 Steps for Creating a Usability Test

1. **Write the script & tasks**
2. Collect the data
3. Analyze the data

Questions to consider

- What is your test objective?
- Who are your users?
- What do you want to know about user behavior that you don't know?
- What assumptions are you making about how users use the site?

Starting the script

- *Make small talk and build rapport.*
- *What are your initial impressions?*
- *What would you do here?*
- *Who is this site intended for?*

Then move on to tasks...

Show me how you would do x.

Creating tasks

Coming up with ideas for tasks

- What are the most important things a user needs to do on the site?
- What areas of the site do you suspect are difficult to use?

TIP: Keep the answers to these questions short! One sentence short.

Create participant tasks

The tasks are scenarios that get the user into the right frame of mind. They should provide context for completing the task successfully.

Idea (what you wrote down)

Make a research appointment.

Task (you'll give this to participants)

Your TF recommended you meet with a librarian to get help finding sources for your final paper. How can you make an appointment?

Tips for writing effective tasks

- Make the tasks realistic.
- Provide context.
- Avoid focusing on a specific feature; instead let the user choose how to use the interface.
- Avoid clues or describing the steps.
- Remember that you're testing the interface, not the user's knowledge.

Creating useful tasks

- Make sure your tasks aren't too easy and yield meaningful data.
- Avoid using words that appear on the page.
- Keep in mind how the user would think.
- Consider restricting them from using the search.

Task Example

Too Easy

You want to see what books you have checked out in HOLLIS, how can you sign in to your account?

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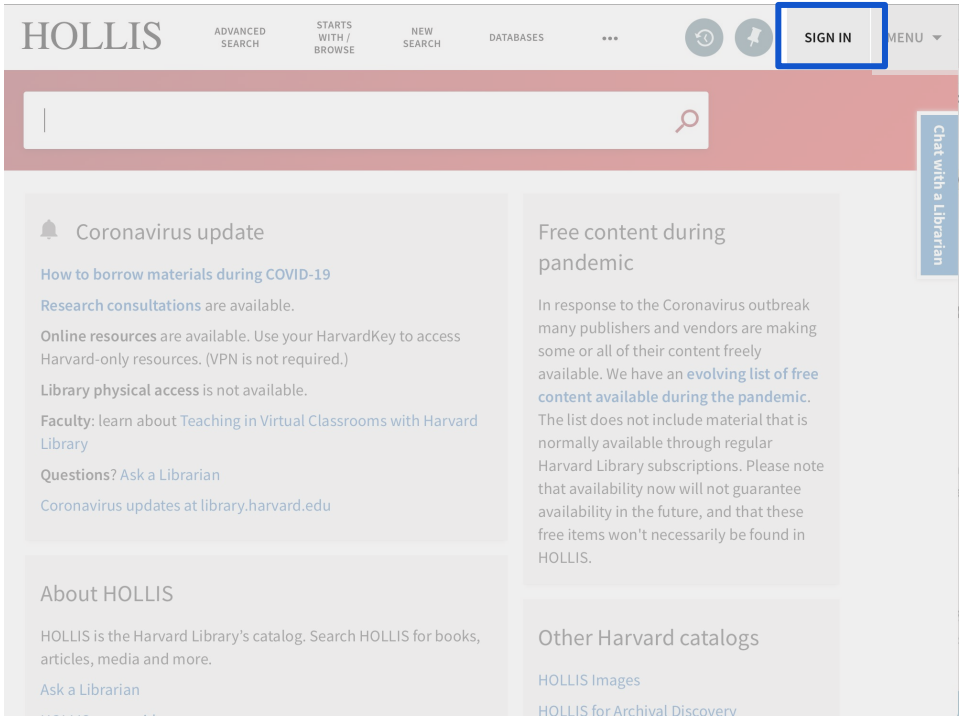

Task Example

Too Easy

You want to see what books you have checked out in HOLLIS, how can you sign in to your account?

Better Task

You want to see what books you have checked out in HOLLIS. How can you do this?

Tasks for remote testing

From Nielsen Norman Group

“The ideal way to deliver tasks is one at a time, and by asking participants to read the task out loud themselves. That way:

- You know they’ve read the entire task.
- They won’t look ahead to later tasks.
- They will practice speaking out loud.”

Tasks for remote testing, con't

How will you communicate the tasks?

- Email the tasks at the beginning of the session.
- Read tasks aloud
- Sent them one-by-one over the chat.

Consider shorter tasks

- Can you break up complex tasks into multiple tasks or sections?

3 Steps for Creating a Usability Test

1. Write the script & tasks
2. **Collect the data**
3. Analyze the data

The moderator’s role

- The gracious host
- The leader
- The neutral observer
- The data gatherer

Tips for moderating

- Let the participant do the talking
- Keep them calm
- Use your poker face
- Respond to a question with a question

Remote moderating tips

- Easier to recruit for remote testing.
- Participants are on their own machines.
- Zoom transcript for note taking and capturing quotes.
- Make sure it is clear that the user needs to join from their computer.
- Send reminders. We use Calendly to manage sign-ups.

Remote moderating tips

- Take the time to build rapport. They are looking directly into your face.
- It’s okay to interrupt a participant in remote tests, especially if there are technical difficulties.
- Turn off all of your notifications - consider a separate user account on your machine.
- Keep observers muted & video off

After the test

- Ask any follow-up questions.
- Offer to demonstrate how to complete any tasks they struggled with.
- Answer any questions.
- Allow time for open-ended feedback*

Once they leave

- Note 3 issues immediately while the test is fresh in your mind.

When to move on from a task

- Watch for body language cues
- Allow them to express frustration or confusion, but don't let them get too stressed.
- Be aware of the time spent on each task.

Practice note taking

Tips for note takers

1. Write down when a user is confused or has trouble completing a task.

2. Record critical incidents only, rather than trying to write everything.

3. Stay quiet until the end of the test when the moderator will ask you if you have any questions.

4. After the test, write down 3 most significant findings.

3 Steps for Creating a Usability Test

1. Write the script & tasks
2. Collect the data
3. **Analyze the data**

Debrief Overview

- Plan how you capture the data to support what you want to know.
- Keep capturing what happened separate from interpretation.
- Consider the need of the audience for your findings (quotes or videos).

Organizing your findings

- Use a notes grid
- Find common issues (more than one person experienced)
- Look for instances where a participant was unable to complete a task

Debrief Step-by-Step

- Organize the data
- Identify what you see
- Sort & cluster the data
- Identify insights

[Turning Data into Insights Article]

Presenting results

- Methodology and participants
- Themes
- Quotes from participants
- Video clips
- Statistics (participants, not all users)

Analysis tips

- Focus on what actually happened in the sessions, rather than how to fix.
- Trust what the users did, not what they said.
- Tackle the most severe problems first.

Guides & resources

- How to write a usability test report
- Debriefing session guide
- Usability Testing Docs on UX @ HL Wiki
- **IT Academy UX Foundations Class**

Usability Testing, Remote Moderator Best Practices

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