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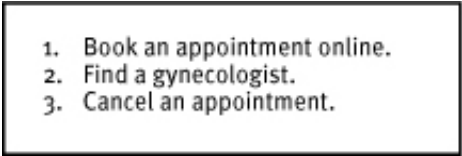
Chapter 6. Find some things for them to do: Picking Tasks to Test and Writing Scenarios for them

Open the pod bay doors, HAL.

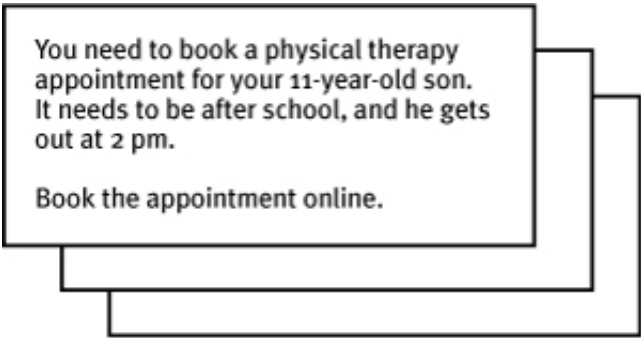
—DR. DAVID BOWMAN (KEIR DULLEA) IN *2001: A SPACE ODYSSEY*

If you're going to watch people try to use what you're building you've got to give them something (or some *things*) to do. It's a two-step process:

- First you choose the tasks to test—the things you want them to try to do.

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1. Book an appointment online.
 2. Find a gynecologist.
 3. Cancel an appointment.

- Then you expand these tasks into scenarios—the little scripts that add any details of context they'll need to know to do the tasks.



You need to book a physical therapy appointment for your 11-year-old son. It needs to be after school, and he gets out at 2 pm.

Book the appointment online.

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First, come up with a list of tasks

The first step is to jot down a list of the most important tasks that people need to be able to do on your site.

Try it right now.

1. Get a sheet of paper.
2. Make a list of five to ten of the most important things people need to be able to do when using your site.

For example, here's my list for my site:

Get info about my workshops.

Sign up for my workshops.

Read a sample chapter of my book.

Buy my book.

Find out about my consulting services.

Go ahead, do it now. I'll wait.

Still waiting.

There. That wasn't very hard, was it? (You did actually do it, didn't you? You aren't just saying you did, right? Because if you are, you really should try it. It'll only take a minute or two. I'll wait.)

It's almost always easy for people to come up with a list of the key tasks for their site. In fact, when I ask an entire Web team to make this list, I'm always surprised at how much overlap there is across their lists. This is one thing they tend to agree on.

The trick is to make sure the tasks you test reflect your users' actual goals, not just your idea of what they want to do.

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Decide which ones to test

Once you have your list, you need to decide which ones you want to do in this month's round of testing.

In a normal "50-minute hour" session, you have about 35 minutes for the participant to spend doing tasks. You might just have one long task or as many as ten.

People will work at different speeds, so you always need to have extra tasks for people who finish early. One good "filler" task is to have them do one of the tasks on a competitor's site.

Your choice of which tasks to test is based on a number of factors:

- What are your most critical tasks? These are the things that people *must* be able to do. If they can't do them, your site will be a failure. For instance, if you're selling books online, people need to be able to find books they're interested in and they have to be able to pay for them.
- What's keeping you awake at night? Things that you suspect people are going to have trouble with. That may confuse people. That aren't as clear as they need to be.
- What does your other user research suggest may not be easy to use? Have you asked customer support what kinds of problems they hear about frequently? What red flags do your Web analytics raise about possible problems people have using your site?

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Make the tasks into scenarios

Once you've decided which tasks people are going to do, you have a writing job ahead of you: converting the simple description of the task into a script that the user can read, understand, and follow.

The scenario is like a card you might be handed for an improvisation exercise in an acting class: it gives you your character, your motivation, what you need to do, and a few details.

Task:

"Apply for a doctoral program at Harvard Business School"

Scenario:

"You've got an MBA, and after a lot of research you've decided to enter the doctoral program at Harvard Business School in Science, Technology & Management.

Apply for admission to the program."

A scenario provides some context ("You are...", "You need to...") and supplies information the user needs to know, but doesn't (e.g., username and password for a test account). Don't go overboard: trim any detail that doesn't contribute.

There's really only one thing that's hard about this: Not giving clues in the scenario.

You have to phrase it so that it's clear, unambiguous, and easy to understand, and you have to do it without using uncommon or unique words that appear on the screen. If you do, you turn the task into a simple game of word-finding. For instance:

Bad: "Customize your LAUNCHcast station."

Better: "Choose the kind of music you want to listen to."

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Don't fence me in

There are two restrictions you may want to place on how people do the tasks:

- Don't use search. (Unless you're testing search, of course.) You will usually want to instruct the participant *not* to use the search feature when doing the tasks. If they use search, all you're really testing is whether the site's search is returning good results. If they forget and try to use search, you can remind them that you don't want them to use it.
- Stay on this site. In most cases, you'll want people to spend all of the limited test time on the site that you're testing. In most cases, they'll do this naturally, so I wouldn't bother stating it up front. Instead, I'd just mention it when they do stray, saying something like, "For the purposes of this test, I'd like you to stay on this site for now."

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Pilot test the scenarios

Once you've got your scenarios written, you want to pre-test them in what's called a pilot test. The pilot test doesn't take as long as a full test: you can usually do it in about fifteen minutes. The purpose is to ensure that the scenarios are clear, complete, and unambiguous.

All you have to do is sit someone down in front of what you're testing, read them the scenarios and have them try to start doing each task. Anything that wasn't clear in the scenario will probably be obvious immediately. This is a case where you can definitely use almost anybody as a participant—in fact, this is a perfect time to use friends and family.

Usually you will do this a day or two before the testing. By that time, your scenarios are written and the developers and designers are [almost] finished producing what you're going to test.

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Print them

Once you've made any final changes to your scenarios, you need to print them in two formats:

- One per sheet, for participants. At the start of each task, you're going to hand them the scenario so they can refer back to it while they do the task.

Plan a trip, involving 30 stops.
Register to receive information about your IRA.

Each one should be on a separate piece of paper, in fairly large type. I find that the easiest way to do this is to print two on a page, then cut the pages in half.

Don't number the tasks, because you may want to change the sequence or skip a task.

- All on one page, for you and the observers.