

1. Intro

Greeting:

- Hello / Good morning / Good afternoon, <user's name>!
- My name is <your name> and I am a <humble job title>. *Don't expose your relation to the product or design you are going to test—it'll decrease user bias.*
- Thank you for joining this session! How are you?
- <Small talk about the weather, the city where a user is from, or plans for the weekend>

Explaining the goal:

- <User's name>, you were chosen because we believe your feedback can help to make <product/feature> better and identify issues with it in early stages.
- Today we'll figure out how convenient, useful, and clear <product/feature> is.

Planned activities (for the case of testing a prototype):

- The session will consist of two parts. We'll have a mini-interview and then I'll ask you to perform some actions with the prototype of <product/feature>.
- The prototype might look like a real <site/app>, but because it's just a prototype, not everything works in it. So, I'll guide you through the steps of a scenario.
- *Optionally, you can say:* What is a prototype? The same way a globe is the model of the Earth, a prototype is the model of a real <site/app>.

“Rules of the game”:

- <User's name>, for the sake of accuracy of this experiment, I won't be able to prompt and I only will answer your questions after the session. Frankly speaking, it might seem like an exam, but it isn't.
- Our goal is to test the <site/app>, not you. There are no wrong and right answers today — any feedback is welcome. Please think aloud about everything you do.

Permission to record:

- We would like to make a video recording of this testing session. It will be a backup in case we need to recall something.
- It's just for internal use—nothing will be shared anywhere without your permission. So, do you allow us to record?
- *If the interviewee approves:* Great! Thank you! Now let's start the mini-interview.

⚠ At this point, do not forget to press the “Record” button.

- *If the interviewee refuses (it's unlikely if you warned about recording beforehand—in the invitation):* Okay, no worries. Then we'll just make some handwritten notes.

2. Mini-interview

Aim at a maximum of 5—6 questions, although the examples below suggest more options than you need at a time.

User persona (*these questions work the best if you design an expert and corporate product; it is less useful for testing mass products*).

- What is your position?
- What are your main work responsibilities?
- Please describe your typical working day.
- What challenges do you have at work? *If a person feels embarrassed:* Let me explain why I'm asking it. It doesn't mean you are to complain. Every profession has some tasks that need more time and effort. Please share such things with me.

Connection with the topic

- How do you usually <e.g., purchase online, track expenses, select hotels>?
- How often do you <e.g., need to commute fast, cancel meetings>?
- When was the last time you <e.g., bought a ticket, visited a hospital, read an e-book>?
- *If a user had a recent case:* Please tell about it in detail.

Previous experience

- What <sites/apps> do you use for <e.g., travel booking, reading news>?
- What do you find useful in <sites/apps mentioned before>?
- What are your main issues with <sites/apps mentioned before>?

Screen sharing

- Thank you for your detailed answers and for sharing insights into <something concrete from the answers>. Now we can switch to the prototype.
- Please start sharing your screen. You need <explanation for your conference tool>.

⚠ Make sure a user doesn't start doing anything with the prototype before you see their screen. Try to give the prototype link after they start sharing.

3. Tasks with a prototype/product

🔗 Optimally, aim at 3—8 blocks of tasks. This part is the least templated because it fully depends on what you are testing.

<Block 1> *For internal use*

1. <The most general task> *Formulated as close to real-life requests as possible, without any prompts and clues.*
2. <Narrower task/question> *If a user cannot cope at the first attempt.*
3. <Backup questions> *In case a user doesn't explain their actions.*

<Block 2>

1. <The most general task>
2. <Narrower task/question>
3. <Backup questions>

...

<Block N>

1. <The most general task>
2. <Narrower task/question>
3. <Backup questions>

Comparison and selection

1. *Put in your zip code.*
2. *What do you see first?*
3. *What will you do next? What did you expect to see? What did you want to achieve by clicking on <button>?*

4. Outro

Words of gratitude

- Congratulations! We've covered all the tasks.
- Thank you for sharing so many ideas, pieces of feedback, and insights. It was especially valuable to learn about <something concrete> and understand better how you <some finding from the testing>. *Gratitude for something a user really shared sounds more sincere.*
- *Additionally:* Thank you for a story about <some insight> and the ideas concerning <feature/module>.

Next steps

- The team will use the gathered information to improve the <site/app> and will take it into account in further developments.
- Feel free to reach out to us if you recall something or come up with additional ideas.
- *Optionally:* Would you like to join our <next research description>?

Good bye

- Thank you! It was a pleasure talking with you.
- Have a good one! / Have a great weekend! / Bye!