Unmoderated Usability Evaluation 101

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Purpose of this deck:

Understand the basic of Usability Evaluation and how to setup and execute unmoderated sessions in Usertesting.com

Agenda

1 **What is a Usability Evaluation?**

2 **Usertesting.com - How to design a test?**

3 **Next steps - Note taking, Analysis, Ideation**

What is a Usability Evaluation?

Usability evaluation (+ Think aloud)

What?

An evaluation format where people perform given tasks using a prototype or product, while narrate their experience:

- 5 to 6 representative participants will be provided with a scenario and tasks using a prototype or product

- Participants are typically asked to think aloud. Narrating the thought process helps the team pinpoint where the success and failure points are and diagnoses the causes.

"Five sessions will usually reveal 85% of the issues with a design"

- Faulkner, 2003

Usability evaluation (Think aloud testing)

How?

DO NOT

- Do not create the feeling that they are being tested

- Do not ask biased questions

- Leave the direct and closed questions to the end of the session

DO

- Assure participants understand what 'think aloud' is. Explain with examples if needed

- Utilize 'think aloud' to understand mindset, intentions, and expectations of people, which will in turn help you decipher what specific attributes of design are causing certain reactions and why

- Capture usability issues, their severity, task success, time on task, num of errors (per need) and prioritize the issues.

Usability evaluation (Think aloud testing)

When?

Great method for evaluating high fidelity prototypes:

- Use it to evaluate if things are easy to use, easy find, people can do the tasks easily, and content is easy to understand

- Low-investment opportunity

- Make quick impacts on the efficiency, effectiveness, and satisfaction of a solution

- Uncovers usability issues

When Not?

Usability evaluation is not suitable for discovery and exploratory questions:

- Usability evaluation is not a right method for 'why & How' discovery questions

- Usability evaluation is not a right method for evaluating concept ideas

Usertesting.com
How to design a test
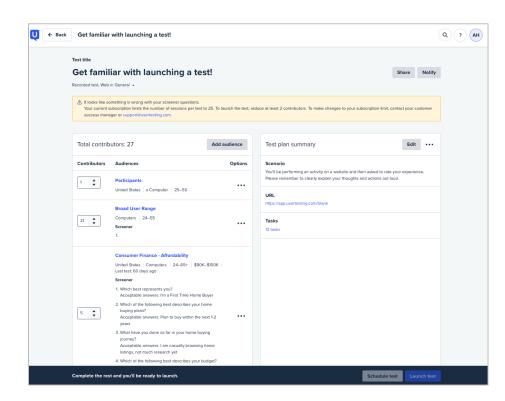
Plan and design the test

Research intake form
- If you have not created one, please do so first. See an example here.
- Research team will help you decide about the right method and participants criteria.

Write a plan script:
- Use a word doc or figma to draft the plan of the test, including scenario and tasks

Create an unmoderated test in Usertesting.com
- If you don't have a usertesting.com credential, please let the design lead know.
- You can create a test from scratch or duplicate a similar unmoderated test.
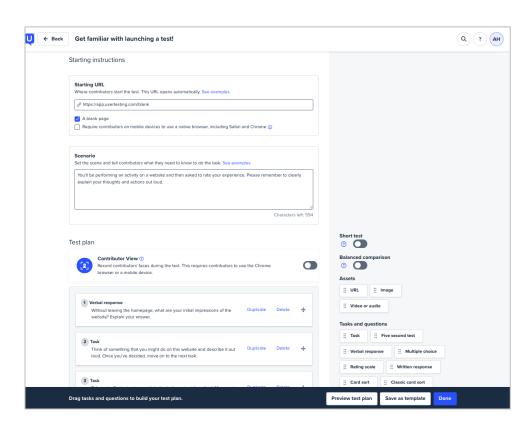
Plan and design the test

Contributors section (Participants criteria)
- As a part of the research intake, specify your criteria for participants
- In UT, Add Audience. Use predefined saved audiences when possible; if needed 'Create from scratch'
- If needed, set "Countries" to "United States"
- Use the three dot to duplicate, edit, or delete per need

Test plan summary section
- Edit the test plan
- Add sections from left per need
- Starting URL- leave blank: https://app.usertesting.com/blank

Plan and design the test

Scenario
- Describe the scenario that sets the stage for the participant
  - *For example: "Imagine you're looking for a house in Nashville and you land on this listing page. You think the photos look good and you'd like to explore if this house is a good fit for you."*
- Per need, emphasize that they think aloud
- Mention that they will be seeing a prototype.
  - *For example: "Please explore the content as you typically would. Keep in mind that this is a prototype and not all the links may be working."*

Questions & Tasks
- Ideally the session should be around a 15-20 minute maximum per participant (typically less than 30 questions/tasks).

Plan and design the test

Tips when designing questions and tasks

- **Tip:** Participants may not follow the instructions exactly and not end up in the pages you expect them to (e.g., per need, provide links throughout the session to redirect them to where you want).

- **Tip:** If needed, leave reminders to "DO NOT TAP on anything" or "DO NOT CLICK on anything" on \ questions, to get feedback on certain things before the participant starts to wander off. For example: "Feel free to scroll through the page but don't tap on anything yet." or "Without clicking on it yet, what would you expect to see if you tapped on it?"

Plan and design the test

Tips when designing questions and tasks

- **Tip:** Keep your tasks and questions short. For example:
  - ✓ "Do not click on the button" is better than
  - ✗ "Please refrain from clicking on anything that you see on the page"

- **Tip:** Make your questions unbiased . For example, something like:
  - ✓ We'd like to bring your attention to the "One-time costs" section. Please explain what this section means to you.
  - ✗ Is the "One-time costs" section useful? Would you call this the "Upfront Costs" section instead?

Plan and design the test

Post task and post test questions

- Use a combination of Verbal and written response to get extensive feedback

- User multiple choice and rating scale to ask follow up post tasks questions (e.g. ease of use, findability)

🚀 Pre-Launch Checklist

Before you launch the test, check the following

- Your prototype link has hotspots hidden

- Make sure the Figma UI is hidden

- "Preview Test": Click through the test and prototype as if you were the participant so that you can look for missing links, missing connections, misspellings, or ways you can more clearly explain a task.

Pilot and Full test

Pilot Launch

- Launch a pilot test with one participant first
- Share with the team and collect feedback
- Evaluate the timing, catch any issues with the test, adjust the script per need

Full test Launch
- Duplicate the test, do the adjustments, add the remaining number of participants (aim for 5 to 6 participants per segment.

Next steps
Note taking, Analysis, Ideation

Note taking, Co-analysis, and Ideation

Use the Figma template

- Duplicate this template
- Take notes collaboratively with the team
- Analysis the data together
- Extract the insights from the analysis
- Prioritize and ideate on the insights