Sample Prototype Test Plan

## Overall objectives

The goals of this study are to:

* Assess the overall effectiveness of [Website] navigation for different users performing basic, common tasks.
* Identify obstacles to navigating the site.
* Create a repeatable usability study plan.

## Research questions

This study will try to answer these questions:

* How easily and successfully are users able to find the content they need on the site?
* What paths do users take to completing a task?
* How well does the site support the paths and goals of users? How closely does the organization and flow of the site match users’ expectations? Do they find it intuitive or confusing?
* What obstacles do users encounter on the way to completing a task?
* Do users understand that group titles on the mega menu (i.e. *Policies*) are also links?
* What questions do users ask as they work through the site?
* How do users feel about the number of steps it takes them to complete a task?

At the end of the sessions, we will have qualitative data:

* The running commentary that participants make as they think aloud will give us indicators about what participants were confused about and why.
* Debriefing interviews will tell us what stands out about the experience of using the site, which will help us set priorities on potential changes to the site.

We will also have quantitative data:

* Errors in completing a task: whether the first click [main bucket] and second click [group] were correct
* Number of assists: the number of times each user needed assistance on each task
* Tasks completed: regardless of whether users made mistakes along the way, if they can complete each task
* Feeling lost: did users ever come to a full stop and say “I don’t know” or “I give up”

## Location and setup

The study will take place in [Location]. Participants will use a Windows PC and Chrome. Participants will either be in [Location], or remote via WebEx. The session will be recorded by data collection software in the computer, and (if the participant is physically present) a video camera to capture the participant’s face. The moderator will be in [Location] with the participant. Observers will watch on a monitor from the observation room.

## Recruiting participants

We will select participants from [Company] employees. We will recruit 8-10 participants from a randomly selected group, with the following characteristics:

* Individual contributors: 5-6
* Managers: 3-4
* Desk workers: 5-6
* Non-desk workers: 3-4

We will exclude people who are:

* At the director level or above
* Employed in HR
* Vendors or contractors

## Task list

The test includes 10 tasks, and users will be asked to complete as many as they can. Tasks are chosen based on frequency, using metrics from the existing site to determine frequent tasks, and vulnerability, using our judgement to identify areas where we suspect there may be usability problems. The task list was written by the usability team. [Note: during the testing phase an 11th task was added.]

## Prototype

The prototype will be a WordPress site. It will include:

* Layout: a very basic layout with font, header size and column width modeled on the design comps. The layout will generally resemble the intended [Website] look and feel, but will not be a finished design.
* Navigation: a megamenu which, while not polished in terms of design, will include menu items with groups and labels in their final form
* Content: as much content pulled into the site as possible, so the prototype presents a realistic experience to the user

## Methodology

This usability study will gather assessment data about the effectiveness of the mega menu (top navigation) of [Website]. Participants will be asked to perform simple tasks on the site. Managers and individual contributors will be given slightly different task lists. We will collect data about error and success rates as well as qualitative data about participants’ experiences using the site.

Test sessions will typically take 20-30 minutes, with 1 hour allocated in case the participant requires more time. [Moderator] will moderate all sessions.

### Introduction to the session (2 minutes)

The moderator will discuss:

* Purpose of the study
* Testing the product, not the participant
* Moderator’s role
* Instructions/protocol for the session
* Thinking aloud

### Initial impressions (2-3 minutes)

Before giving over control of the mouse, the moderator will ask the participant to describe what content they would expect to find within each mega menu, based only on the labels. For instance, “what do you think would be under *Life*?”

### Tasks (15-30 minutes)

Participants will perform 10 simple tasks, read to them by the moderator. In the case of a two part question, the moderator will read the first part, allow the participant to complete the task, then read the second part. After each task the moderator will ask for general feedback if they completed the task easily, or specific questions if they had difficulty. For example “first you looked for that in *Career*, but it was actually in *Life*. Tell me about where you expected that to be.”

If a participant ever seems confused or uncertain, the moderator will offer gentle prompts at first:

* “Is there a word or phrase you’re looking for?”
* “Where do you expect that to be?”
* “Go ahead and keep looking.”

The moderator will give more direct hints if the participant grows frustrated or is lost:

* “You were close, go back to the *Life* menu and look there.”
* “It’s not here, go to the *Life* menu and look there.”
* “There is a way to get there through the menus. Go to the *Life* menu and look there.”

The moderator will not allow participants to spend too long going in the wrong direction for any task. If a participant ever becomes stressed or seems completely lost, the moderator will stop the task and remind the participant that the purpose of the test is to find flaws in the prototype, and difficulties with the task are not a reflection on the participant’s ability.

### Post-test debriefing (2-5 minutes)

After all tasks have been completed the moderator will interview the participant:

* Ask broad questions to collect preference and other qualitative data
* Follow up on any particular problems that came up for the participant

## Measures

To answer the questions listed above, we will collect both performance and preference data during the test sessions.

### Performance:

* Number of errors
* Number of hints
* Number of tasks completed with and without assistance.
* Correct or incorrect first click and second click for each task
* Feeling lost (full stop while saying “I don’t know”)

### Preference:

* Usefulness of terms and labeling
* Appropriateness of site’s navigation to users’ tasks
* Perceived number of steps
* Ease of use overall

## Report contents

The study report will:

* Briefly summarize the background and goals of the study
* Present findings for the original questions to investigate
* Give quantitative results and discusses specifics as appropriate to the question and the data
* Discuss the implications of the results
* Provide recommendations
* Suggest follow-up research
* Include raw data at the end of the report

## Project Schedule

**Planning meeting/kickoff:** has already taken place. The development team met with [Moderator] and agreed on basic goals, task structure and study methodology.

**Task creation:** has already taken place. Tasks are at the end of this document.

**Test plan and materials**: The prototype will be ready by [Date].

**Pilot test**: will take place at [Location] on [Date].

**Testing**: will take place at [Location] from [Date] – [Date].

**Report**: will be completed by [Date].

## Tasks

1. You’re planning for your retirement. Find out more about retiring from [Company].
2. Do employees get a day off for Labor Day in 2015? What is the date?
3. You have an older child who is extremely interested in a STEM career. Attending [School] would be a great start. Is there anything [Company] can do to help with tuition?
4. You would like to advance in your current position.
   1. What are the levels for your position?
   2. What skills do you need to move to the next level?
5. You just joined the [Company] dental plan, and your dentist doesn’t work with [Company] insurance company.
   1. Can you continue seeing your dentist? Download the form you will need for your visit.
6. You would like to transfer to a different position within [Company].
   1. Find out what positions are available.
   2. You found a job you want to apply for. The job is in another country. What are the rules about transferring to another office location?
7. [for managers:] You just hired someone who is new to [Company] and will be starting next week. Find out what [Company] expects you to do to help your new hire get started.  
     
   [for non-managers:] A new person just got hired in your group. Your manager asked you to help your new coworker get started. What steps will they need to take in their first few weeks?
8. Your spouse just changed jobs, and their new job is a contract position that doesn’t offer medical insurance.
   1. Can you add your spouse to your health care coverage now, though it’s not the open enrollment period?
   2. Download the form to add your spouse to your health care coverage.
9. You need to take a day off.
   1. Find out what the rules are for taking a personal day.
   2. Request the day off.
10. [for managers:] One of your employees is struggling and has asked to have a coaching conversation with you. Find out more about what you can do to help them.  
      
    [for non-managers:] You’ve just had a review meeting in which you and your manager set your goals for the next year.
    1. Find instructions on how to enter your goals into the system.
    2. Enter your goals into the system.
11. You’re interested in taking your family to King’s Dominion. Find out if there is a reduced rate available for [Company] employees.