

PlaybookUX Study Creation Guide

Who can I test with this platform?

Unmoderated

Internal - PBUX Bring-Your-Own; Anything works! Prototypes, sites with security walls, etc

External - PBUX Recruitment \$50/person OR Bring-Your-Own for non-military customers

Moderated

Internal - PBUX Bring-Your-Own; If you want more detail than unmoderated tests offer

External - Use conference call instead; For military customers who cant download 3rd party recording software

Important Info

PlaybookUX screen recording should not be done with multiple monitors.

Test Script

- Identify your hypothesis and which area of your interface you want to focus on.
- Keep it simple and small.
 - What looks like a 10-15min test to you may take participants 30+min
 - You can always do multiple small tests!
- Write a draft script first, then flesh out your prototype to match the script. Refine.
- Always start the script with an 1-3 sentence intro to give participants context.
 - Include who they are, why they are using this interface, and what their goal is
- Indicate that the user can move the task prompt window if needed.
- If using paid recruitment, you may want to ask about user background at the beginning
 - Ex: We know they are military, but what branch / rank / experience level?
- Prompt with questions often.
 - Some users will not think aloud as directed, but tasks that are only a question will require that they do.
- Avoid leading questions.
 - Less good: On a scale of 1 to 5, how easy was that?
 - Better: On a scale of 1 to 5, how difficult (1) or easy (5) was that?
- Provide a reference to which page a user should be on for the current/upcoming task.
 - Ex: "When you are finished, click CONTINUE to move on to Mission Details."
- It may be helpful to indicate the user can close out of the site when the test is done.

Prototype Setup

- Set your prototypes to work for ANYONE WITH LINK.
- Turn off hotspot hints.
- Test your script & prototype combo before sending it out to participants.
 - Keep referring back to your hypothesis to make sure it is still being addressed!

Participant Invites

See example invitation below, which covers all important pre-test information.

EXAMPLE INVITE:

The following is an unmoderated, self-paced think-aloud study on our new usability testing platform - PlaybookUX. You will be prompted to download their screen recorder to proceed. Since it is recording your screen, please do not use multiple displays or it may interfere with recording the correct screen.

Please take the study in a quiet place, as you will need to talk continuously during it. It should take about 20-30min to complete. Pre-written tasks will appear on the screen during the test, and will instruct you in what to do.

When you are ready, here is the link:

[[[INSERT LINK HERE]]]

(OPTIONAL)

Also of note - this is a limited Figma prototype that does not have all the links and hover states built in. Everything mentioned in task prompts should be there, but if you encounter any areas that are not clickable for some reason, just state what you would expect to happen if you could proceed.

EXAMPLE SCRIPT QUESTIONS:

Without clicking on anything yet, describe the purpose of this screen and any first impressions you have.

Without clicking on anything else, what further actions could you imagine taking from here? (Good for incomplete prototypes!)

What type of interactions would you expect to have here?

Is there any information missing on this page?

What does the data on this screen mean?

What does X indicate?

Were able to answer any questions you have about X? Why or why not?

Were there any fields that you were unsure about what to input?

Overall, on a scale of 1 to 5, how difficult (1) or easy (5) was it to answer questions about the data being presented? Why?

What parts of this prototype were confusing, if any?

What parts of this prototype did you like, if any?

If you have additional commentary that was not covered (suggestions, parts that were confusing, etc), feel free to say that now. Thank you for participating!