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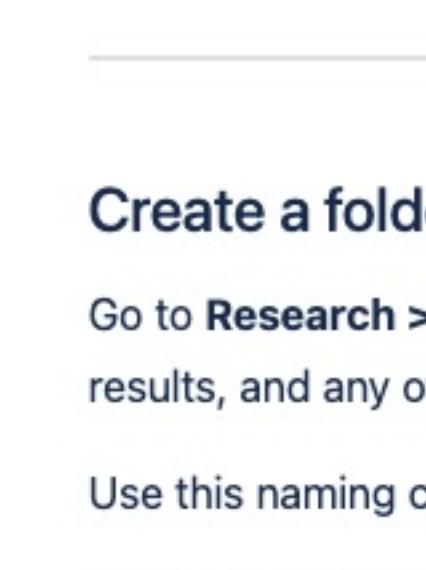
Usability Test Planning – Template & Guidelines



Owned by Taleah Codrington ...

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Test Plan Template.docx

02 Oct 2024, 02:26 PM

Give your test a descriptive name.

Include the platform and what is being tested. For example, "Bag Promo Badges on Web".

Create a folder for your test in our Box account.

Go to [Research > Sally](#) and create your folder there. This will be where you place your test plan, test results, and any other reference material like video clips of your user tests.

Summarize changes

Use this naming convention for your new folder: **SB_ProjectName_Platform_Quarter_FiscalYear****Example:** SB_BagPromoBadges-Web_Q4_FY24

Determine your Objective.

Briefly state the goals of the test. Specify what we want to observe and learn from it.

Example: To determine how users understand and interact with the new promotional badges in the updated bag product card design.

State a Hypothesis.

What do you predict the results of your test will be? Start with your overall expectation for the test and follow up by listing specific goals you believe the design will be able to meet.

Example: I believe that the addition of these badges will increase clarity around promotions. Users will better understand what promotions are currently running, what items a promo is applicable to, any requirements that need to be met to be eligible for one, and when a promo has been successfully redeemed.

Describe the test scope and any variants you are testing for.

Explain what's being tested, how you will test it, and any differences in the prototype(s).

Example: We will test the product cards in the shopping bag with both single and multiple promotions running. The prototype is of the mobile web version of the bag.

The actual scope depends entirely on the needs of your test.

- You may need to test one flow, or you may need to test multiple versions
- Sometimes you will only need a static mock-up of one screen to answer a few simple questions, and other times you may need to build a fairly elaborate interactive prototype
- Sometimes we will run usability tests on existing site pages and do not need to build anything new

Tip: By default we almost always build tests only for mobile devices because a large majority of our customers shop on smartphones. Don't build separate tests for tablet or desktop unless you need to test specific functionality for those screen sizes.

Include any links to the resources being tested.

This will usually be a link to a Figma prototype or a page URL.

When you are preparing to share a Figma prototype, keep the following in mind:

- Make a shareable link that anyone can view
- Be sure your prototype link starts at the correct place
- In your prototype settings, make sure your screen size is correct
- Test the prototype link on your own mobile phone

Find more information about sharing prototypes here: <https://help.figma.com/hc/en-us/articles/36004053173-Share-files-and-prototypes>

Determine the roles of your UX Research team.

Assign yourself or any team members all the roles that are applicable.

- Observation:** Who is involved with looking at test footage/watching live tests
- Interviews:** Who is conducting interviews of users
- Notes:** Who is taking notes for in-person or live interviews or moderated tests
- Testing:** Who is involved with building the test plan and launching it
- Prototyping:** Who is involved with the designing the prototype/mockup
- Analysis:** Who is involved with aggregating all the data from the test and presenting conclusions & recommendations

Determine the test methods used:

- Remote or In-Person
- Moderated or unmoderated
- User Interviews
- Usability test
- Card sort & tree test
- Survey Questions

Determine your participants and (if necessary) screener questions.

There are a few basic filters you will always use when building an audience:

- Number of Participants:** A large majority of the time we will need only 5
- Device:** Almost always mobile smartphone (you are able to restrict users to certain devices within UserTesting)

Country: Almost always USA

If the needs of the test are best served with a very specific type of audience, you can further narrow it down by age, gender, income, and various other parameters.

You can also create custom screener questions to get the best type of users for your test. Some of the things you might want to screen for is how often they shop online, what they shop for, whether they are existing Sally shoppers, etc. Determine which answers will get a user either accepted or rejected by the screener.

Example of a screener that is commonly used:

Have you Shopped Online in the Last 6 Months?

- Yes [Accept]
- No [Reject]

Have you purchased anything online within the last 6 months?

- Yes [Accept]
- No [Reject]

What products did you purchase online?

- Food (groceries, take out) [May select]
- Household supplies (kitchen tools, cleaning supplies, storage, etc) [May select]
- Clothing [May select]
- Beauty/Hygiene products (shampoo, conditioner, face/body wash, hair dye, makeup, razors) [Must select]
- Electronics (TV, computer, phone, tablet) [May select]
- None of the above [Reject]

Tip: If you're looking for something subjective, create a screener question that makes the user have to read and think a little bit. Often testers will blow through simple yes/no answers rather than answer honestly.**Example screener question that is looking for price-conscious shoppers:**

Which of the following best describes your online shopping style?

- I am always looking for a bargain or deal when shopping online [Accept]
- I care about saving time and effort when I shop online more than anything else. [Reject]
- Deals and bargains don't have much influence on how I normally shop online. [Reject]
- I sometimes look for bargains or deals when shopping online. [Accept]

Start with some exploratory questions.

Exploratory questions are like a pre-testing brainstorming session. They are meant to help you dig a little deeper into what you want to get out of the test, and are helpful to reference during the task-building phase.

Example:

- How do users interpret promo badges? What are their assumptions or expectations?
- Do customers see the badge as interactive? If so, what prompts them to click/tap?
- Does the popup modal with promo details add more clarity?
- Do customers know what to do to meet the promo requirements?
- Does the design help them figure out what steps to take (adding more products to bag, etc.)?
- Do users understand when promotions have been activated?
- Do customers understand when there is more than one promotion on an item in their bag?
- How well do customers understand promotions that include a free item?

Craft a scenario for your test.

The scenario is meant to provide a bit of context and set the "scene" for the users at the beginning of the test.

Example: Pretend you're a bargain-conscious shopper who wants to make sure you're getting the best possible deal on all the items you've added to your shopping bag. Please explain your thought process out loud throughout the test as you complete the tasks given to you. Remember that there are no right or wrong answers.**Example 2:** Imagine you're buying products for your business. Scan the bag page that includes a list of items to review and evaluate for purchase. Throughout the test, please speak aloud and provide your opinion in full. Also, keep in mind that there are no correct or incorrect responses.**Tip:** If you're looking for something subjective, create a screener question that makes the user have to read and think a little bit. Often testers will blow through simple yes/no answers rather than answer honestly.**Example of a task that is too "leading":** The order place has multiple fulfillment methods, find the method that has a tracking number.**Tip:** If you're looking for something subjective, create a screener question that makes the user have to read and think a little bit. Often testers will blow through simple yes/no answers rather than answer honestly.

Formulate your test tasks.

Test tasks are meant to get the users to interact with the prototype in a realistic way, with the goal of gaining qualitative insight on what works and what doesn't.

We want to write each task in a way that prompts users to figure things out for themselves. We want to know their logic and their perspective, so keep these guidelines in mind:

- Make the tasks realistic & actionable
 - Context:** You have an order that requires a person to pick it up.

Actionable task: Verify the name of the pickup person.**All together now:** You have an order that requires a person to pick it up. Verify the name of the pickup person.

- Avoid suggesting (or outright explaining) what to do. Or combining 2 tasks into 1.
- The order placed has multiple methods of fulfillment and you want to review the details of your order. How would you expect to change/edit the pickup person's name and which fulfillment method has a tracking number?

Example of a task that is too "leading": The order place has multiple fulfillment methods, find the method that has a tracking number.**Tip:** If you're looking for something subjective, create a screener question that makes the user have to read and think a little bit. Often testers will blow through simple yes/no answers rather than answer honestly.Use your test plan to build and launch your test on [UserTesting.com](#).If you are unfamiliar with UserTesting, [here is a video tutorial](#).**Tip:** To make sure your test is able to meet your goals, soft launch it with only one user. If there are no blockers preventing users from completing the test successfully, you can run it with the full 5 users.**Tip:** If you're looking for something subjective, create a screener question that makes the user have to read and think a little bit. 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Owned by Taleah Codrington ...
Last updated: Oct 02, 2024 by Kathleen Walker • 3 min read • 2 people viewed

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30 Sep 2024, 05:25 PM

Summarize

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Review the UserTesting videos of your test.

- Watch each user test video and take notes. Identify where users ran into problems and where they completed tasks smoothly. Pay close attention to anything unexpected and keep a lookout for accessibility concerns.
- Collect quotes and video clips of any interactions you find interesting, insightful, validate your design decisions, and/or demonstrate weak points in the design that need fixing.
 - Here is how to save clips in UserTesting, and here is how to download them.
 - You can use the auto-transcript on the right side of the page to easily copy and paste text.
- Once all your notes are collected and analyzed, organize your findings in patterns. Group similarities and themes in behavior or feedback.
- Method to analyze and synthesize data: Affinity Diagramming - [NN Affinity Diagramming: Collaboratively Sort UX Findings & Design Ideas](#)

Collect participant demographic data.

Review the information of your actual participants in UserTesting and fill it out in your results template—detail the ages, genders, and income range.

i This information can be found in the "Summary" section of your test.

Restate the goals of the test.

Briefly restate the goals to give context to the results. Similar to the Objective in the test plan.

Example: To determine how users understand and interact with the new promotional badges in the updated bag product card design.

Summarize the results based on your findings.

Synthesize your findings in brief bullet points. Stick to factual information. For maximum impact, offer relevant user quotes to back up your points.

Example:

- The badges performed well and met users' expectations. All users understood at first glance what they were, and quickly worked out that they were clickable when prompted to look for more details.
 - "I thought it was intuitive. I'm no tech wizard or coder or anything like that but I do shop online quite frequently. I found it easy to understand based on the explanations of the promos here."
 - "I liked the fact that when I clicked on it, I could see what the promo was."
 - "I thought it was pretty easy to understand based how I shop online and how it stood out there in a little arrow."

- 2 out of 5 users expected to be able to shop for more items (when needed to qualify for a promotion) without leaving the bag.
 - "Possibly the only thing that could be improved upon is when seeing what the promos are and seeing that pink bar [promo badge] maybe giving me the option to go ahead and add additional items."
 - "I know I could go out and continue shopping. I don't see a link here that says add more products or anything."

Optional: add insights & observations

Occasionally some interesting, relevant information comes up during analysis that isn't strictly a data point, but may be an idea worth exploring further or something that can strengthen your recommendations. They can be useful talking points when presenting your test results to stakeholders.

Example: While it was coincidental, all the users for this test fell into a similar demographic as our "Lisa" persona (users in their 40s-50s with moderate tech literacy and in most cases, visibly using an Android device in their test videos). Promo badges tested well with a group known for running into a lot of pain points during checkout.

! Not every test will have these, nor are they required to add to your report. It's purely optional.

Make recommendations based on your results.

The results of your test will inform any action that needs to be taken, whether it's changes to the design or further testing to refine your conclusions. If the results validate your design, then moving forward with the current version can also be a recommendation.

Example:

- The bag promo badges are clearly understood and beneficial to users. Implementation should move forward.
- Tweak the language on the green text for clarity around multiple promos. For example, when an item has 2 promos running and only one has been applied, instead of "Promotion Applied!" say "1 of 2 Promotions Applied!". Let's discuss technical feasibility for this with development.

i State your recommendations with confidence—you have evidence to back you up!

+ Add label

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