**Usability Testing - Facilitator Guide**

Version x.x – Last edit mm-dd-yyyy

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| **SESSION DETAILS** | |
| **Participant Number** |  |
| **Date** |  |
| **Time** |  |
| **Location** |  |
| **Condition (as applicable)** |  |

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| **Introduction** |
| Thank you again for agreeing to help us today. My name is \_\_\_\_\_\_\_\_\_\_, I work for \_\_\_\_\_\_\_\_\_\_, and I’m here to help walk you through an evaluation for.  *[Acknowledge/introduce any observers]*  Just to give you a quick overview of what to expect, the goal of the session today is to  *[State high-level usability goals, e.g. gather feedback about a conceptual prototype for a redesign of a website]*  The first thing I want to make clear right away is that we’re using you to evaluate <product>, I am not evaluating you and any existing knowledge you have. There’s no “wrong answer” here, so no need to worry about making mistakes.  Also, please don’t worry that you’re going to hurt my feelings. We’re doing this to improve the <product>, so I need to hear your honest reactions. Any comments you have are welcome.  I’ll provide task scenarios that will ask you to interact with the <product> in order to complete your objectives. I would like you to read the instructions out loud and let me know when you are ready to begin the task. As you use the <product> I would ask that you “Think Out Loud”, like a stream of consciousness. Talk about what you see, what you expect, what you like, dislike, and anything confusing or unclear.  If you have any questions as we go along, just ask. I’ll answer them immediately if I can, or after the test. If you need to take a break at any point, please let me know.  **Do you have any questions before we begin?**  *[Address any questions or postpone until later as appropriate if you run the risk of biasing the participant or too off topic for the research being conducted]*  *[If your company requires a Non Disclosure Agreement (NDA) and one is not already in place, cover that now]*    *[If you plan to record the review sessions explain that here, and obtain written consent. Once consent obtained begin recording before proceeding]* |

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| **background questions** |
| I am going to start by asking you a few questions about you and what you do for work.  *[Ask questions relevant to the person and their work. Examples include: Job title, description, high level duties, length of time on the job, any past experience doing similar work, where they do their work, do they work individually or collaboratively, devices/equipment used, top frustrations, etc.]*  On a scale from 1-10, 1 being very low and 10 being very high, how tech savvy would you rate yourself?  Very Low Neutral Very High  1 2 3 4 5 6 7 8 9 10 |

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| ***task #: [name for task]*** | | | |
| **Scenario:**  *[High level description of the environment, the situation – what is the participant’s motivation?]*  **Objective:**  *[Describe the activity that you want the participant to perform. Provide enough details to complete the task without leading them]*  **Expected path/outcome:**  *[The ‘happy path’ that you expect the participant to do]*  **Things to look for:**  *[Notes on any research or design questions you want answered or behavior to watch for]* | | | |
| **Outcome:** | Succeeded | Succeeded w/difficulty | Failed |
| **Observations:**  *[Make notes regarding the participant’s experience: comments or observations of physical behavior, any challenges or frustrations they encountered, mistakes made, ideas for improvement; if help offered, why; if failed, what went wrong, what did they do instead, etc.]* | | | |
| **Questions:**  *[Questions related to the task]* | | | |

*[Repeat for additional tasks – see last page for an example task]*

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| **debrief and closing** |
| Well, that is all I had for you to complete. Thank you so much for your help. I have a few additional questions as we wrap things up.  *[Ask questions relevant to the insights you hope to uncover or design decisions you want answered. Here are a few basics to get you started]*  What do you think about the <product>?  What are your 3 favorite things about this <product>?  What are your 3 LEAST favorite things about <product>?  Do you have any recommendations for changes to the way this <product> looks or works?  *[Take the time to probe for additional insight and clarification for any comments, behaviors, or other observations from during the review]*  *[Address any questions you postponed from earlier in the session]*  Well, that is all that I have for you today. I thank you again for your valuable input, it is greatly appreciated. Is it okay if I contact you again should I have any additional questions? Likewise, if you think of any additional feedback later, or have any questions, feel free to contact me.  *[Make sure to provide contact information, see participant out per your company polices]* |

**[EXAMPLE TASK:]**

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| ***task 1: Order Supplies*** | | | |
| **Scenario:**  *You are a lab technician who is getting ready to start a new series of research. Looking over the stock inventory you notice a few key chemicals you will need are in low supply. You will need to order more before the research begins.*  **Objective:**  *Using the Lab Stock Ordering (LSO) system create a purchase request for the following chemicals:*   * Hydrochloric Acid, 0.60 Normal, 10L * Oxalic Acid, 0.100 Normal (N/10), 0.0500 Molar (M/20), 2L * Dimethyl Sulfoxide, 4L   **Expected path/outcome:**  *Purchase request created for the following products: (10 units) of EW-86980-12, (2 units) of EW-86980-99, and (1 unit) of EW-88007-87 (respectfully).*  **Things to look for:**  *Do participants browse the catalog or search?*  *Do participants easily find the shopping cart to check out once all items are selected?* | | | |
| **Outcome:** | Succeeded | *X* Succeeded w/difficulty | Failed |
| **Observations:**  Participant starts to browse, then notices the long list of chemicals  *“This is a huge list of every single chemical in the catalog. I would have thought that these would be in some kind subcategory organization, not just a long list of products. It’s not even broken down by chemical – for example every version of Hydrogen Peroxide is on this page, I would expect just Hydrogen Peroxide to be listed and I click to drill in on that chemical to see the different product options available for it, but they were ALL on the main list page which makes it hard to navigate and find what you want.”*  *“I think categorized would also be helpful – like alphabetical, or by chemical type, reagents, organics, etc . perhaps”*  Gives up on the browse and goes to search  *“Is there a way to search by chemical compound? Like HCl instead of Hydrochloric Acid? It should allow me to either use either.”*  *“I would like to have an advanced search – to maybe filter by the concentration or purity.”*  Struggles a bit to find the Hydrochloric acid since there are 143 results. At first was confused there was no 10L options but then realized to add 10qty of the 1L product  Adds other two products fine  Cannot find the shopping cart to check out  *“I did not see the cart at first, it took me a while. I was expecting it in the upper right hand corner, that seems the typical location for it. I did not expect to find it in the footer.”* | | | |
| **Questions:**  Do you typically browse or search when visiting a site where you can order products? Is it different for sites you are visiting for the first time compared to sites you visit frequently?  *“I would say that I typically search, I guess. I depends less on if I’ve been there before and more on if I have a specific purchase in mind. If I know exactly what I want I’d probably search – this is the typical case when I’m making online purchases. There are occasions that I may browse, but those are less common and might be because I’m checking to see what is available, like buying shoes, or because the site has a sale going on or something.”* | | | |