



# Seven Steps to Effective Usability Testing

December 2016

## Step 1

### Make the Case for Usability Testing

Your efforts will...

- Save development time and avoid the headaches of major post-launch revisions.
- Improve your acquisition and retention rates.
- Uncover critical glitches that may cause site abandonment and loss of competitive edge.
- Minimize the risk of launching a site that does not adequately address your targeted user needs.
- Save money - the usability testing cost benefit ratio is considered to be \$1 invested equals \$10 - \$100 in interface development savings. Spending 10% of your development budget on usability testing will work.

## Step 2

### Review Your Goals

Usability testing is best for...

- Gathering detailed qualitative feedback on the navigation, functionality, content and nomenclature of an interface. If you are looking to ask yes/no questions, segment your audience or learn A/B preferences a quantitative survey is needed.
- Exploring your site or app's value proposition and its overall ease of use.
- Understanding the opinions of your target users.
- Moving a project along whether you are in an agile or waterfall project development environment.

## Step 3

### Plan to Succeed

- Choose a city for the testing that is logistically easy so that you and all stakeholders can attend.
- Work with a professional research facility as they will be your partner for a successful project.
- Develop a screener questionnaire that enables recruiters to select participants that accurately fit into your targeted audience segments. Interviewing friends / family is not ideal.
- Select an objective and experienced moderator.
- Set expectations for a realistic schedule as follows:
  - Week 1 - Facility selection, screener development & start recruitment
  - Week 2 – Site / interface reviews & moderators guide development
  - Week 3 – Complete the usability testing
  - Week 4 – Report development & delivery

## Step 4

### Develop a Solid Moderator's Guide

- Ideally a discussion guide should have the following:
  - Introduction about the interview and what the participant is being asked to do.
  - Pre-task questions about the industry and/or competitive set.
  - Task based questions tied into the key features and/or functionality of the site. This will let you know if the navigation, content and terminology is working.
  - Summary questions to wrap up ideas and get overall opinions on all that was explored.
- Interview sessions should be 1 on 1 and between 45 - 75 minutes in length.
- Let all stakeholders review the guide to offer ideas.
- Conduct a trial run through with a colleague.

## Step 5

### Execute on Testing Day

- Show up way before your first interview to check the computer set up, video equipment and room arrangements.
- Set expectations properly – not every interview is going to be stellar and you may hear some negative or unique feedback.
- Make adjustments with your moderator as minor changes to questions and the order in which they are asked can be productive.
- Don't panic – if you are testing a prototype don't start playing around with it after each interview.

## Step 6

### Prepare a Solid Summary Report

- Give your team and/or moderator about a week to develop a comprehensive and detailed report.
- Explain the research methodology and project objectives in the report as some who read it may not have been able to attend in person.
- Add lots of screen shots as most people are visual.
- Provide the reader with findings and recommendations that enhance the decision making process.
- If 8 of 10 people were able to complete a task don't say 80% – stick to “8 of 10” as percentages make results sound statistically valid, which they are not.

## Step 7

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### **Don't Stop With One Test**

- Conducting usability testing on a regular basis will benefit your overall marketing and interface development efforts.
- Additional usability research will allow you to spot new trends and hear opinions directly from your customers and prospects.
- Try to coordinate your usability testing results with quantitative research efforts and site analytics to paint a broad picture about the health of your interface.
- After seeing usability testing for the first time, you should be able to get additional budget for follow up research as the key players will see its value.



## About First Insights

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- Our specialties include:
  - Usability Testing
  - Contextual & Ethnographic Interviews
  - Heuristic Analysis
  - Focus Groups
  - Competitive Analysis
  - Quality Assurance
- Based in NYC & Chicago with resources nationwide.
- Team has diverse background in advertising, marketing, project management and interface design which provides a unique viewpoint.

## About First Insights

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- Experience working with Fortune 500 clients and startups in multiple industry verticals including:
  - Banking & Finance
  - Packaged Goods
  - Insurance
  - Media & Publishing
  - Pharmaceuticals
  - Travel
  - Automotive
  - Technology
  - Internet Pure Plays

## Questions & Contact Info

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- Lon Taylor – Principal Usability Consultant
  - NYC 212 926-3700
  - Chicago 312 455-0088
  - [www.firstinsights.com](http://www.firstinsights.com)