Add usability to your skill set!

Note to ourselves: Do not use this fancy but unusable font type!

Dharmesh Mistry & Lisa Rex
Dharmesh Mistry

• dcmistry on drupal.org and Twitter
• UX for Drupal & Acquia
• Boston Design Jam, Bentley, UPA
• Desserts & Photography

Lisa Rex

• lisarex on drupal.org and Twitter
• UX for Drupal & Acquia
• NYC UX and Drupal communities
• Genealogy and Internet cats
And who are you?
AGENDA

Why are usability studies important?

A few basics

Preparation for a study

The unmoderated usability study

The moderated usability study

The analysis

Q&A
WHY ARE **USABILITY STUDIES** IMPORTANT?
“Testing with one user is 100% better than testing with none.”
- Steve Krug
A FEW BASICS
WHAT THE HECK IS USABILITY TESTING?

Design + Technology + Psychology

Improve the usability of a product
Real users doing real tasks
Observe
“Usability testing is the second most used evaluation method and the method that has the most impact on making products better”

FLAVOR THAT SUITS YOU

Formative vs. Summative

Moderated vs. Unmoderated

In Lab vs. Remote
WHEN? IS THE QUESTION

Idea
Prototype
Read to go live
In use

In simple words: At any point during the lifecycle of a product
The preparation
1. Goals

2. Prepare

3. Recruit (Moderated)

4. Conduct (Moderated)/ Set up (Unmoderated)

5. Analyze

6. Report
STEP 1: GOALS

Talk to stakeholders to determine the business and usability goals of the study.
STEP 2: PREPARING

Where is the product in terms of development cycle?
What tasks will be covered?
Duration of each session?
Who should you test?
Methodology
Number of participants
Compensation and total cost
STEP 2: PREPARING, cont.

Study outline

- Background questions
- Scenario
- Login details
- Tasks and questions
- Post-session questions
STEP 2: PREPARING cont.

The more severe the problem, the more likely it is to be uncovered within the first few subjects.

“Approximately 80% of the usability problems identified would have been found after only five subjects.”

Number of participants
3- 65% / 5 – 80% / 9 – 95%

“Virtually all of the problems judged high in severity were discovered after running 5 subjects, whereas only 55% of the problems judged low in severity were found.”

source: Brizi study
Mandatory Cat Photo for Drupal Folks
She’s working on a site that is highly focused on a specific type of user: the Drupal developer. She needs feedback from Drupal developers... anyone else won’t provide the knowledge that is needed to improve the site.

Tip: 15-60 minutes | 5-8 participants | 3-5 tasks
STEP 2: **PREPARING** (MODERATED), cont.

**Screensharing or recording tools**

- Morae
- WebEx
- Skype
- Join.me
- Google+ hangout
- ???
STEP 3: RECRUIT

Find the “right” participant

Develop a screener

**Recruit via:**
- Family/ Friends
- Social Networking, Craigslist, etc.
- Associated groups or organizations
- Recruiting agency if you have the cash lying around

Set expectations with participants
STEP 4: CONDUCT

Use a checklist or prepared script
- Explain the purpose of the study and what to expect
- Informed consent
- Thinking out loud
- Explain your role as an unbiased observer
- Assure them that we are not testing their skills or abilities
STEP 4: CONDUCT cont.

**During the session**

Establish rapport, but be professional

Ensure their physical and emotional comfort

Be observant

Be greedy for information

Watch the time

Give assists, but only if needed

Thank them

**Tip:** Do not jump to conclusions while conducting the session
He works for University of Minnesota and is considering re-designing the library website. He is somewhat aware about usability but has not had the time to dive into it. He wants to make sure that the students can perform the tasks easily and quickly (like finding a book, making the reservations for a meeting room). Unfortunately, he has little time and little budget.

Tip: 15 minutes | 6-8 participants | 4-5 tasks | 4 post session questions
Instructions For Your User Testers (as they're recording the video)

* URL

check web address (opens in a new window)

* Scenario

Characters left: 750

* Tasks

Task 1

Task 2

Task 3

Task 4

Characters left: 2500

Empty tasks will be discarded

Questions for Your User Testers (after they've finished recording the video)

* Questions for the user to answer in writing (up to 4)

What frustrated you most about this site?

If you had a magic wand, how would you improve this site?

What did you like about the site?

How likely are you to recommend this site to a friend or colleague (0=Not at all likely, and 10=Very Likely)?
WRITING SCENARIOS & TASKS

Choosing the user and tasks

Typical or Frequent Tasks/ Critical to operation
New or Existing user

Choose your words carefully!
• Do not use words that are in the product
• Write in plain language
• What order should tasks be done?
• How many tasks should you have?
• What are the dependencies between the tasks?
• Can I compare designs?
• How can I give moderated assists?
Tip: Running a pilot | Getting refund back
STEP 5: ANALYSIS

What to note?
- Positive
- Issues
- Bugs
- Observations
- Quotes and annotated screenshots

When to note?
- During the session
- Have a scribe, if possible
- Revisit the tapes and make notes
Mandatory **Beer** Photo for Drupal Folks
Categorize the positive/negative/observations

Severity: Low/Medium/ High
Frequency: Rare/ Common / Very Common
Scope: Local/ Global
STEP 6: WRITING THE REPORT

Purpose
Why did we test?
How did we test?
Whom did we test?

Executive Summary

Positives

Major Issues

Detailed findings

Recommendations

Observations

Next Steps
STEP 6: **THE EXECUTIVE SUMMARY**

There were no Urgent problems uncovered. Overall, the response was positive and participants could find their way towards achieving the tasks quickly.

See [Calculating the Severity of a Usability Issue](#) for an overview of how these scores are calculated.

**High severity findings**

- Bulleted list

**Medium severity findings**

- Bulleted list

**Task scores**

Tasks are rated from 1 (low) to 5 (high) by the moderator for efficiency and effectiveness, based on what the participant does and says. Anything 3.5 or high is acceptable, but 4 or higher is the goal!

Average overall score by task:

- [Task 1] = 3.85
- [Task 2] = 3.01
- [Task 3] = 3.55
- [Task 4] = 3.66

When asked what their overall experience was, given everything they’d seen in the session, the average score provided by participants was 3.6.
Online Tools to consider
- Chalkmark
- ClickHeat, ClickTale
- Clixpy
- CrazyEgg
- Ethnio
- Five Second Test
- Feedback Army
- Loop11
- Mechanical Turk
- Morae
- Open Hallway
- Usabilia
- Usertesting.com
- UserVue
- Verifyapp