**Usability Testing Process and Materials List**

Conducting a usability test requires the proper planning in order to get the most out of it. Here you’ll find a comprehensive list of the steps and materials that typically go into planning and executing a usability study.

Because the nature and rigor of all studies is different, this list is not meant to be prescriptive. Instead, it should serve as a modifiable planning guide, from which you can choose the steps, materials, and templates that are most relevant to your particular study.

**Planning**

**Plan Test**

* Draft an overview of the usability testing process to generate understanding and buy in from key stakeholders
* Complete test planning spreadsheet ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_planner_template.xlsx))
  + Research questions
  + Measurable business goals
  + List of user tasks based on user research
  + Scenarios based on user tasks, business goals, and research questions
  + Pre- and post-test questions
* Assign roles to team members:
  + Facilitator
  + Note taker(s) – may want to have one to take notes on what the users say and one to take notes on the paths they take looking for information
  + Observer caretaker (this person explains expectations/directions to the observers and facilitates a discussion with them, if necessary, after they observe each session)
  + Video editor (in case video clips are required)
  + Recruitment manager
* Schedule meeting room(s) or remote meeting software for setup, testing, and participant debrief / waiting
* Set up select pre/post test questions in survey software (if necessary)

**Get Approvals for Your Test**

* [Web Governance Team](http://www1.eere.energy.gov/communicationstandards/approval.html)
* [Office of Management and Budget (OMB)](http://www.eere.energy.gov/communicationstandards/paperwork_reduction_act.html) – Only necessary if you are testing 10 or more participants from the general public

**Recruit Participants**

* Create recruiting materials:
  + User profile/personas based on user research (start with the [EERE personas](http://www.eere.energy.gov/communicationstandards/pdfs/eere_personas_fullview.pdf))
  + Recruitment criteria, schedule, and participant background ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_recruitment_criteria_schedule_template.xlsx))
  + Recruiting screener ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_recruitment_screener.docx))
  + Recruitment, confirmation, and reminder emails ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_recruitment_emails.docx))
  + Consent to record (to be included with confirmation email) ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_consent.docx))
  + Thank you notes and package honorariums for participants ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_thankyou.docx))
* Recruit participants (allow at least 2-3 weeks for this process)
* Send confirmation invitations (including consent to record) to participants and team members for:
  + Walkthrough (someone internal to the organization)
  + Pilot test (outside participant from target audience group)
  + Usability test (outside participants from target audience group)
* Make arrangements for user participant gratuities

**Develop and Assemble Test Materials**

* Materials for participants:
  + Consent form to sign ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_consent.docx)) – note that we typically request consent verbally, on tape, for remote studies
  + Pre/post test questionnaires (in person only) ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_sus.docx))
  + Participant version of scenarios (so they can refer to them during the test) (in person only)
* Materials for team:
  + Test script (compiled from test planning spreadsheet; includes facilitator intro and think out loud protocol, scenarios, and pre/post test questions) ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_script.docx))
  + Note taking form for facilitator ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_notetaking_simple_template.docx))
  + Note taking spreadsheet for note takers ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_notetaker_spreadsheet_template.xlsx))
  + Criteria for measuring the success of each scenario ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_success_criteria_example.docx))
  + Issue tracking spreadsheet ([template](http://www2.eere.energy.gov/communicationstandards/docs/ux_test_issue_tracker_template.xlsx))
  + Participant names/emails/phone numbers
  + URLs for surveys that you'll need to place in the chat window (remote only)
  + Call in number for team to debrief after each session (if team is not collocated)
* Materials for observers:
  + Test script ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_script.docx))
  + Rules of behavior for observers
  + Note taking forms for observers ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_notetaking_simple_template.docx))
  + Criteria for measuring the success of each scenario ([template](http://www.eere.energy.gov/communicationstandards/docs/ux_test_success_criteria_example.docx))

**Schedule Observers**

* Send invites to observers; include brief description of test process and rules for observers
* Schedule observers to attend the usability test session(s) and note the names on the daily schedule for reference

**Set Up Testing Environment**

* For in person tests:
  + Put up "Do Not Disturb" signs
  + Be sure screen capture/camera set up works properly
  + Ensure observer's room screen cast works properly
  + Check supplies for test room (pens, paper, refreshments for participants)
  + Ensure observer room has adequate chairs, table space, office supplies, etc. for observers scheduled to take notes
  + Print copies of all test materials
* For remote tests:
  + Set up in a quiet location
  + Use a land line and head set so your hands are free for taking notes
  + Print copies of all test materials
  + Facilitator should:
    - Put your cell phone on vibrate and within reach in case observers or the participant needs to reach you
    - Have email open and minimized, in case you need to communicate with the participant
    - Get a glass of water
  + Note takers should:
    - Set up your workspace (2 monitors, or 2 computers - one with virtual meeting software and one with note taking spreadsheet)
    - Get a stop watch and be sure it's working.

**Walk Through and Pilot Test**

* Send out reminder email to walkthrough and pilot test participants the day before the session; copy team
* Review test objectives, success measures, and areas of concern with note takers
* Verify set up of testing environment
* Conduct walkthrough
* Revise test materials as needed based on walkthrough
* Conduct pilot
* Revise test materials as need based on pilot test
* Check lab supplies and replenish as needed

**Usability Test**

* Send out reminder email to test participants the day before the session; copy team
* Verify set up of testing environment
* Conduct tests
* Debrief with team after each session and capture key positive findings and usability issues on the issue tracking spreadsheet
* Debrief with observers
* Post all videos to predetermined location

**Data Analysis**

* Work with team to determine final list of positive findings, usability issues
* Work with team to develop recommendations for improvement
* Choose video clips that illustrate your main findings
* Prepare summary of findings and recommendations; include video clips ([template: scenario-by-scenario analysis](http://www2.eere.energy.gov/communicationstandards/docs/ux_test_report_scenariobyscenario_template.docx)) ([template: final report](http://www2.eere.energy.gov/communicationstandards/docs/ux_test_report_template.pptx))
* Present and distribute summary of findings and recommendations
* Send thank you notes