## Usability Test Script for Facilitators

*Note: This script is specific to conducting remote usability studies using some type of virtual meeting software. However, it can easily be adapted for use in in-person studies.*

*If you have used the usability test planning spreadsheet to develop your test, you can simply paste your pre/post test questions and scenario information from that document into this one in preparation for conducting your test.*

**Introduction**

*(Mute all but participant)*

Do I have <name> on the line? Hi, my name is [NAME] and I’ll be walking you through this session today. I also [NAMES] on the line, who will be taking notes during our session. (There are also a few additional team members who will be observing.)

Thank you so much for agreeing to participate in this study on the Department of Energy’s [NAME OF SITE/APPLICATION BEING TESTED]. As you may know already, the purpose of the study is to help us understand what the user experience is like. The results will be used to help make improvements to the design of the site.

**Technical troubleshooting**

*(If you don’t see them in the GoTo Meeting:)* Did you receive the GoTo Meeting invitation?

*(If yes)* Can you click on the link in the email? It may take a minute for GoTo Meeting to download the software – just click Yes or Activate if you need to give any permissions.

*(If no)* Could you please go to the GoTo Meeting site? The address is joingotomeeting.com. Let me know when you get there and I will give you the meeting ID. It may take a minute for GoTo Meeting to download the software – just click Yes or Activate if you need to give any permissions.

*(If you do see them in the meeting)* I see you were able to log into the meeting.

I’m going to pass control over to you so we will be able to see your screen while you are working with the site. So you may want to close out of your email or other applications at this time.

*(Click “change presenter”)*

When you are ready, please click the Show My Screen button that should have popped up.

If, on the off chance that we lose our phone connection during our session, you can just call back into the GoTo Meeting number you received in the email.

*(Turn on recording)*

**Consent to record**

Did you get a chance to read the consent form for video recording for today’s session? It should have been sent to you along with the Outlook invitation.

*(if yes)* Do you consent to the recording?

*(if no)* I’d like to ask for your permission to record this study session. The recording will only be used to improve the application and share the results of the study. Your name will not be associated with the recording or with any of the paperwork that we fill out during today’s session. Do I have your consent to record today’s session?

**Agenda for session**

What I’d like to do is ask you a few questions about your background up front. Then we’re going to step through a series of tasks in which you will use the [NAME OF SITE/APP]. I’m going to ask you to work through the tasks the best that you can, like you would typically do without someone watching you. At the end, we’ll talk about your experience using the [SITE/APP], and I’ll have you fill out a short online questionnaire. The whole process should take about an hour.

**We’re testing our ideas, not you**

I want you to know that we are testing the [SITE/APP] today. We are in no way testing you. There are no right or wrong answers to the questions I’ll ask you today. We’re interested in your honest impressions, so please feel free to share what you think of your experience. You’re not going to hurt anyone’s feelings – we just want to find out what is and is not working so we can make it better.

**Think aloud**

Since I can’t see you, I’m going to ask you to please talk out loud as you are using the site. Say whatever is on your mind - like a running commentary of everything you’re seeing and thinking. So, when you read something on the screen, read it out loud. When you click a link, say what you’re clicking on so I can follow along. Include your thoughts, opinions and comments as you go.

If at any time you need me to repeat a question, or if you want to stop or take a break, just say so and we’ll do that. Do you have any questions? All right, let’s get started.

**Pre-Test Questions**

I’d like to start by asking you some questions about your job.

[ADD PRE-TEST QUESTIONS HERE]

Thanks for all that information; that was really helpful. Now we’re going to turn our attention to your screen and I’m going to ask you to work through some exercises using the [SITE/APP]. I’m going to send you a URL through the chat window. Do you see it?

*(Send URL)*

**Scenarios**

1. **[NAME OF SCENARIO]**

[ADD THE SCENARIO WORDING HERE; ONE SCENARIO PER PAGE]

**Facilitator prompts:**

[ADD ANY FACILITATOR PROMPTS FOR THIS SCENARIO]

**Answer:**

[ADD THE ANSWER TO THIS SCENARIO]

**Pathways:**

[ADD ALL OF THE PATHWAYS A USER COULD GO DOWN TO FIND THE CORRECT ANSWER]

**Research questions:**

[LIST THE RESEARCH QUESTIONS YOU ARE HOPING TO ADDRESS WITH THIS SCENARIO]

***EXAMPLE OF A SCENARIO PAGE***

1. **Find a publication**

You are thinking about installing a small wind turbine on your ranch, but want to know more about how they work and whether it would make economical sense for you.

Find a publication on the basics of small wind turbines.

**Facilitator prompts:**

* *(whether they search or browse):* What is your impression of the results you got?
* *(be sure on search results listing page when ask this):* How could you get a copy of a/the publication so you can read it later?

**Answer:**

* Guide to small wind energy systems: <http://www.energysavers.gov/pdfs/guide_to_small_wind_energy_systems.pdf>
* Small Wind Electric Systems: A Consumer’s Guide: (also those by state, if there’s one for their state)

<http://www.nrel.gov/docs/fy07osti/42005.pdf>

* Guide to Renewable Energy: (not as good an answer as the first two)

<http://www.energysavers.gov/pdfs/guide_to_renewable_energy.pdf>

**Pathways:**

* 1. Search box
  2. Browse > General topics > Wind > Small wind applications

**Research questions:**

* Can users successfully find a useful publication?
* What is their first instinct in finding a publication – to look by search or browse?
* How useful are the results they get?
* Do users use the search box?
* Are they successful with the search box?
* Do they scroll down to see their results?
* Do they know how to revise their search?
* Is the download task an easy one—do users prefer that over ordering?

**Post-Test Questions**

*(Set up SUS and Net Promoter questions in an online survey tool ahead of time.)*

Now I’m going to ask you some questions about your overall experience using the [SITE/APP] today. Again, please be candid with your responses. To start, I am going to send you a link through the chat window. When you get it, please click on the link and answer the questions you see there. You don’t need to talk aloud during this part of the session.

*(Send link to SUS/Net Promoter questions; watch silently as the participant answers them.)*

*(The last part of the session will be conducted in an interview.)*

Great, thanks. Now please return to the [SITE/APP] home page. I’d like to ask you some additional questions.

[ADD ADDITIONAL POST-TEST QUESTIONS HERE]

*(Turn off recording)*

Thanks so much for the time you’ve given us today; your comments were very helpful, and we’ll be using them to help us enhance the [SITE/APP]. We’d like to send you a small thank you; would you be comfortable providing your address?