

Usability Testing

Step-by-step Guidelines



[UsabilityTesting Checklist](#)

(helping you track the process - when you check all the boxes, it is done 🎉)

Plan - Test - Ideate - Present

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Step 1 - Plan

Fill out the [[Planning Template](#)] and share with other researchers for feedback

Guideline for Planning Research

Q1

1. Secondary Research

- Review Dev Launchers' previous research, to see if there is similar research that has already been done before.

★ Resources:

Dev Launchers' previous usability testing [report](#)

2. Research Plan

- 4W1H: **What** is your research plan? **Why do you** need to conduct it? **When?** **Where?** And **How?**

(1) Basic info of the study (Team, Researchers, Date)

(2) Logistics of the study

- Introduction
- Research Goals
- Research Questions
- Methodology

Type of the Research (Moderated/ Unmoderated, A/B Testing, etc.)

★ Resources:

[Planning Template](#)

Q2 Examples

3. Participants

- Describe who is your target audience, and decide how to recruit potential users as participants for the usability testing.

* **ParticipantsNumber >= 5**

(1) Who will you include in this study?

(2) What characteristics do the participants have?

(3) Why did you choose them?

(4) Recruitment

★ Resources:

Current persona - designers, developers, ...

[Planning Template](#)
[Participants Tracking and Insights Template](#)
[Recruitment: ways to find participants](#)
[LinkedIn Dev Launchers contacts](#)

4. Preparation

- Make sure everything is ready to go.
 - (1) Prototypes for testing
 - (2) Software - Specify the tools each of the moderator is going to use
(meeting tool and recording tool)
 - (3) Expected path
 - (4) Interview Guide

★ Resources:

[Planning Template](#)
[Interview Guide Template](#)
[How to Record Google Meet on Windows PC](#)

Step 2 - Testing

Conduct the usability testing and take a record of the process, upload the material on your project shared Google folder.

Guideline for Conducting Research

1. Reach out to Participants

- Schedule the research time with participants and provide the basic information of the research.

★ Resources:

[Calendly Example](#)

2. Research Process

- Follow the interview guide to conduct the research and make sure the research is recorded.

* Pay attention to:

- Observation
- Consistency
- Note Taking
- Recording

★ Resources:

[Interview Guide Template](#)

[Participants Tracking and Insights Template](#)

3. Sync with the Team (more discussion)

- Make sure to communicate and update with the team about the progress in a timely manner (using the tools your team prefers).

Step 3 - Ideation

Draw conclusions from the usability test, and provide actionable insights.

Guideline for Analyzing, Synthesize Data & Ideation

1. Gather the data in one place

- Collect the research data in one place for further discussion and analysis.

2. Organize the data

- Put the data with answering the same or similar research questions, or providing similar information together.

Affinity Diagram - using sticky notes to organize the data into 4-5 clusters

3. Find themes

- Build on the previous step, find the themes in each cluster.
 1. Find patterns in each cluster.
 2. Connect the patterns to user experiences.

4. Come up with insights

- Come up with actionable insights (possible solutions and recommendations) from themes.
 1. Answer the research questions
 2. Easy to understand
 3. Inspire direct action

★ Resources:

[Participants Tracking and Insights Template](#)

Step 4 - Presenting & Sharing

Conduct the usability testing and take a record of the process, upload the material on your project Google folder.

Guideline for Presenting and Sharing the Research

1. Who to Share

- Share to people who are involved in the project or who will be impacted by its results.
 - (1) In-team Share
 - Store and upload the relevant documents to the team research folder
 - (2) Out-team Share
 - Store and upload the Research Plan Form, presentation (deck) and research report to the Usability Testing Collective Folder
 - Including the contact person for people who want more information about the project.

★ Resources:

[Shared Google Folder](#)

[Overview of Previous Research](#)

2. How to Share

- Ways to share the research
 - (1) Presentation (deck)
 - (2) Research Report

★ Resources:

[Template for Presentation](#)

3. What to Share

- The content that should be included into the report.
 - (1) Background
 - (2) Product Tested
 - (3) What we did (methodology)

- (4) Results
- (5) Positive Findings
- (6) Opportunities for improvements
- (7) Key findings & recommendations (e.g. positive findings, opportunities for improvements, was there any hypothesis before the test? what happened?) NOTE: I usually add the recommendations prioritized as major, moderate, minor based on observations.)
- (8) Recommendations & next steps (we usually add this after an ideation session with the team)
- (9) Disclaimer (Accounting bias and factors that could have influenced the results.)
- (10) Appendix (where to find plan, script and all important documentation)
- (11) Thanks

★ Resources:

[Template for Presentation](#)

Roles and Responsibility of Team Members

Researchers - Research Plan, Testing, Ideation, Presentation

Designers - Prototypes, Ideation

