

Usability Test Checklist

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The purpose of this checklist is to identify the activities required for planning and executing a successful usability test.

1. Meet with Stakeholders to Conduct an Initial Interview

- Review the system to be tested
- Document concerns and define problem statements
- Determine acceptable usability goals and purpose

Use these to determine your “[Key Evaluation Measures](#)”

- Review user profiles or types of users
- Determine a preliminary test date
- Document:
 - o Intent of the test
 - o Overall methodology planned
 - o Business objectives and goals
 - o Usability goals
 - o Users and user groups to be tested

2. Recruit Participants

- Document the number of participants in each user group to be tested
- Develop a testing schedule based on preferred times and dates
- Develop a screener to vet participant qualifications according to user group
- Use any resources to contact users:
 - o Internal or customer databases
 - o E-mail contacts
 - o Newsletter, product, or web site posts
 - o Professional recruiting agencies
 - o News, web site, or social-networking service ads
- Schedule participants

3. Plan the Test

- Design test scenario and task list
- Determine key evaluation measures
- Create a usability test protocol containing:
 - Anticipated machine set up (lab, off-site, etc.)
 - Checklist for setting up and facilitating each test session
 - Introduction script
 - Non-disclosure and recording agreements
 - Background questionnaire
 - Tasks (including success criteria, participant test booklets, etc., if needed)
 - Debrief questions
 - Post-task or post-test satisfaction surveys, if needed
- Schedule any facilities or space required for lab setup, observation, or participant debrief/greeting
- Load the necessary software and data needed to conduct the test
- Confirm test dates and time with participants, including location, maps or directions, and contact information
- Create a folder for each participant containing all participant paperwork included in the test protocol
- Prepare “thank you” notes and considerations for participants
- Invite executives, managers, development team members, marketing staff, and other stakeholders to observe the tests

4. Run-through the Test

- Install final software and/or prototypes and configure the test machine
- Review test objectives, metric measures, and areas of concern with observers
- Run a pilot usability test, including recording
- Revise test materials as needed based on pilot test

5. Conduct the Test

- Power up lab machine, check cameras and microphones
- Send connection information (e.g. IP address) for using Morae Observer to stakeholders and observers
- Check availability of refreshments for participants
- Greet your participant at test site as scheduled
- Ensure participant comfort (e.g., temperature, seating, etc.)
- Have the participant fill out the non-disclosure/recording agreement and any background questionnaires (if not using Morae to deliver surveys and questionnaires)
- Start the Morae recording
- Review the test procedure with the participant (using the Introduction script)
- Use best practices for facilitation
- Debrief participant after test (including post-test questionnaire and any questions)
- End Morae recording
- Thank the participant, give any considerations for participation, and walk participant out
- Reset your test or lab machine, clear data, and save participant activity as appropriate following each test session
- Collect all test materials, save recording file, review with observers as time permits, and store notes and materials in folder; debrief with stakeholders and observers periodically

Repeat these steps for each participant test session

6. Analyze the Test

- Using Morae Manager, review your test and conduct analysis on key evaluation measures
- Make highlights video clips of interesting moments
- Document findings and recommendations (collaborate with development and stakeholders)
- Create a presentation or report
- Present findings and highlights tape to stakeholders

7. Next Steps

- Send thank you notes and considerations to participants (if not already done)
- Determine “lessons learned” and communicate to peer group
- Finalize project portfolios, organize and/or archive recordings, and store materials for later reference