Usability Testing Checklist

Six weeks before

- ☐ Create a project plan/ roadmap document to manage tasks related to the user test (optional, but useful to manage task completion and responsibilities) *(see sample project plan outline)*
- ☐ Determine what you want to test (Web site, wireframes, prototype, etc.)
- ☐ Create RFP (if hiring a vendor for doing usability testing)
- ☐ Select vendor for test moderating/recruiting

Four weeks before

- ☐ Determine dates for testing, pilot testing and de-briefing sessions
- ☐ Schedule periodic meetings with team/stakeholders per project plan
- ☐ Create your list of tasks to test *(see guideline on how to write good task objectives)*
- ☐ Decide ideal user mix for your study *(see recruiting guideline)*
- ☐ Once dates and times for the study are confirmed, book rooms with Internet access, tables, chairs, conference phone, speakers, projector (applicable for on-site testing)
- ☐ Find a place near the test room for participants to sit and wait when they arrive (applicable for on-site testing)
- ☐ Book an observation room with Internet access, tables, chairs, conference phone, speakers, projector
- ☐ Update project plan spreadsheet as applicable

Three weeks before

- ☐ Send "save the date" email inviting team members and stakeholders to observe the testing sessions (if applicable)
- ☐ Get feedback on task list and task objectives from stakeholders
- ☐ Share consolidated feedback on tasks, with vendor (if applicable) OR update task objectives
- ☐ Arrange honorarium for participants (e.g., order gift certificates, requisition cash) *(as applicable)*
- ☐ Ensure that prototypes/development site needed for the testing will be available for dates of testing.
- ☐ Update project plan spreadsheet as needed

Two weeks before

- ☐ Start screening participants and scheduling them into time slots
- ☐ Review session plan, script, prototypes (also get feedback from stakeholders if needed)
- ☐ Update session plan, script, prototypes *(as applicable)*
- ☐ Update project plan spreadsheet as applicable
- ☐ Confirm participant schedule and testing session timing
- ☐ Update project plan spreadsheet as applicable

E-mail ieee-web-team@ieee.org with questions

One week before

☐ Send email to the participants with directions, parking instructions, location of the test room, name and phone number of someone to call on the test day if they're late or lost, and the non-disclosure agreement if you're using one *(applicable for on-site testing)*

☐ Line up stand-by participants in case of a no-show

☐ Install and test the screen recording and screen-sharing software

☐ Confirm session plan and script

☐ Update project plan spreadsheet as applicable

Three days before

☐ E-mail participants to reconfirm and ask if they have any questions

☐ E-mail reminder to observers confirming test session timings, observation guidelines, meeting room updates, etc.

☐ Get any user names/passwords and sample data needed for the test (e.g., account and network log-ins, dummy credit card numbers, or test accounts)

☐ Do a pilot test to ensure that the technology to be used, application to be tested and the script are all in sync

☐ Make copies of handouts for participants (if script requires task to be read out to participant)

☐ Make copies of session guide and the observation handout for observers (as applicable)

☐ Recruit someone to manage the observation room

☐ Make sure incentives for participants are ready

☐ Make sure you have your USB microphone, external speakers, extension cords, and thumb drive or CDs for screen recording files

☐ Order water/snacks for the observation room and testing room (if applicable)

☐ Verify that no one has double-booked your test and observation rooms

☐ Find someone (either from the reception area or from your team) who can welcome the participants when they arrive, give them a comfortable place to sit while they're waiting, and then escort them to the test room when you're ready to start

☐ Make sure you have any phone numbers you might need for the observation room, test room, greeter, and IT contact

☐ Update project plan spreadsheet as applicable

One day before

☐ E-mail participants to reconfirm and ask if they have any questions

☐ Verify that no one has double-booked your test and observation rooms

Test day (before the first test session)

☐ Make sure the speaker phones in the observation room and test room are working

☐ Put observer handouts in the observation room

☐ Make sure whatever you're testing is installed on the test computer and/or accessible via the Internet

☐ Test the screen recorder: do a short recording (including audio) and play it back

☐ Test screen sharing (video and audio) with the observation room

☐ Turn off or disable anything on the test computer that might interrupt the test (e.g., email or instant messaging, calendar event reminders, scheduled virus scans, software updates)

☐ Create bookmarks for any pages you'll need to open during the test

Before each test session

☐ Start screen sharing session, if necessary

☐ Clear the browser history

☐ Open a "neutral" page (e.g., Google) in the Web browser

While the participant signs the consent form

☐ Start the screen recorder!

At the end of each test

☐ Stop the screen recorder!

☐ Save the recording!

☐ End the screen sharing session, if necessary

☐ Take time before the next session to jot down a few notes about things you observed

☐ If it's the last test of the day and you've been using a desktop computer, copy the screen recording files to a CD or thumb drive

After testing sessions are over

☐ Ensure each participant has received/confirmed honorarium receipt

☐ Prepare agenda for de-briefing session (if applicable)

☐ Send out reminders related to de-briefing session attendees (if applicable)

After de-brief session is over

☐ Review report received from vendor

☐ Meet with stakeholders to share key findings and chart out next steps

☐ Begin planning for implementing changes based on findings of the report