

CHAPTER

# 10

# Usability testing: The movie

HOW TO DO YOUR OWN TESTING

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**T**his chapter explains how to conduct a test if you're the facilitator and what to look for if you're an observer.

## What to do if you're the facilitator

If you've never conducted a usability test, the main thing you need to know is that you should just relax, because there's not much to it. Your responsibility is to tell the users what you want them to do, to encourage them to think out loud, to listen carefully to what they have to say, and to protect them.

Here's a list of the things to keep in mind. If you read this list and the sample session that follows it, you'll be ready to start testing.<sup>1</sup>

- **Try the test yourself first.** The day before the test, try doing whatever you're going to ask the test participants to do and make sure that you can do it in the time allotted. Make sure that whatever pages you're testing are accessible from the computer you'll be using, and that you have any passwords you'll need.
- **Protect the participants.** It's your responsibility to prevent any damage to your test users' self-esteem. Be nice to them. If they get stuck, don't let them get too frustrated. Be sure to pat them on the back (figuratively), and thank them (sincerely) when you're done. Let them know that their participation has been very helpful—exactly what you needed.
- **Be empathetic.** Be kind, patient, and reassuring. Make it clear to them that you *know* they're not stupid.

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<sup>1</sup> If you still feel the need for more advice, I recommend Jeffrey Rubin's Handbook of Usability Testing. See my reading list on page 183.

- **Try to see the thought balloons forming over their heads.** The main thing you're trying to do is observe their thought process. Whenever you're not sure what they're thinking, ask them. If the user has been staring at the screen for ten seconds, ask, "What are you looking at?" or "What are you thinking?"

You're trying to see what their expectation is at each step and how close the site comes to matching that expectation. When they're ready to click, ask what they expect to see. After they click, ask if the result was what they expected.

- **Don't give them hints about what to do.** It's a lot like being a therapist. If they say, "I'm not sure what to do next," you should say, "What do *you* think you should do?" or "What would you do if you were at home?"
- **Keep your instructions simple.** There aren't very many, so you'll learn them quickly.

"Look around the page and tell me what you think everything is and what you would be likely to click on."

"Tell me what you would click on next and what you expect you would see then."

"Try to think out loud as much as possible."

Don't be afraid to keep repeating them; it will be more boring to you than to the user.

- **Probe, probe, probe.** You have to walk a delicate line between distracting or influencing the users and finding out what they're really thinking, which they may not know themselves.

For instance, when a user says, "I like this page" you always want to ask a leading question like "What do you like best about it?" If this produces "Well, I like the layout" then you need to follow with "What appeals to you about the layout?" You're looking for specifics, not because the specifics themselves are necessarily important but because eliciting them is the only way you can be sure you understand what the user is really reacting to.

- › **Don't be afraid to improvise.** For instance, if the first two users get hopelessly stuck at the same point and it's obvious what the problem is and how to fix it, don't make the third user struggle with it needlessly. As soon as he encounters the problem, explain it and let him go on to something more productive.
- › **Don't be disappointed if a user turns out to be inexperienced or completely befuddled.** You can often learn more by watching a user who *doesn't* get it than one who does. Because more experienced users have better coping strategies for “muddling through,” you may not even notice that they don't get it.
- › **Make some notes after each session.** Always take a few minutes right after each test session to jot down the main things that struck you. If you don't do it before you start the next test, it will be very hard to remember what they were.

## A sample test session

Here's an annotated excerpt from a typical—but imaginary—test session. The site is real, but it has since been redesigned.<sup>2</sup> The participant's name is Janice, and she's about 25 years old.

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<sup>2</sup> *My thanks to the folks at eLance.com for allowing me to use an earlier version of their site as the subject of this example.*

INTRODUCTION

Hi, Janice. My name is Steve Krug, and I'm going to be walking you through this session.

This whole first section is the script that I use when I conduct tests.<sup>3</sup>

You probably already know, but let me explain why we've asked you to come here today. We're testing a Web site that we're working on so we can see what it's like for actual people to use it.

I always have a copy in front of me, and I don't hesitate to read from it, but I find it's good to ad lib a little, even if it means making mistakes. When the users see that I'm comfortable making mistakes, it helps take the pressure off them.

I want to make it clear right away that we're testing the *site*, not you. You can't do anything wrong here. In fact, this is probably the one place today where you don't have to worry about making mistakes.

We want to hear exactly what you think, so please don't worry that you're going to hurt our feelings.<sup>4</sup> We want to improve it, so we need to know honestly what you think.

As we go along, I'm going to ask you to think out loud, to tell me what's going through your mind. This will help us.

<sup>3</sup> A copy of the script is available on the companion Web site ([www.stevekrug.com](http://www.stevekrug.com)) so you can download it and edit it for your own use.

<sup>4</sup> If you didn't work on the part that's being tested, you can also say, "Don't worry about hurting my feelings. I didn't create the pages you're going to look at."

If you have questions, just ask. I may not be able to answer them right away, since we're interested in how people do when they don't have someone sitting next to them, but I will try to answer any questions you still have when we're done.

We have a lot to do, and I'm going to try to keep us moving, but we'll try to make sure that it's fun, too.

You may have noticed the camera. With your permission, we're going to videotape the computer screen and what you have to say. The video will be used only to help us figure out how to improve the site, and it won't be seen by anyone except the people working on the project. It also helps me, because I don't have to take as many notes. There are also some people watching the video in another room.

If you would, I'm going to ask you to sign something for us. It simply says that we have your permission to tape you, but that it will only be seen by the people working on the project. It also says that you won't talk to anybody about what we're showing you today, since it hasn't been made public yet.

Do you have any questions before we begin?

No. I don't think so.

It's important to mention this, because it will seem rude not to answer their questions as you go along. You have to make it clear before you start that (a) it's nothing personal, and (b) you'll try to answer them at the end if they still want to know.

At this point, most people will say something like, "I'm not going to end up on *America's Funniest Home Videos*, am I?"

Give them the release and non-disclosure agreement to sign. It should be as short as possible and written in plain English.<sup>5</sup>

<sup>5</sup> You'll find a sample form on the companion Web site.

## BACKGROUND QUESTIONS

Before we look at the site, I'd like to ask you just a few quick questions. First, what's your occupation?

I'm a router.

I've never heard of that before. What does a router do, exactly?

Not much. I take orders as they come in, and send them to the right office.

Good. Now, roughly how many hours a week would you say you spend using the Internet, including email?

Oh, I don't know. Probably an hour a day at work, and maybe four hours a week at home. Mostly that's on the weekend. I'm too tired at night to bother. But I like playing games sometimes.

How do you spend that time? In a typical day, for instance, tell me what you do, at work and at home.

I find it's good to start with a few questions to get a feel for who they are and how they use the Internet. It gives them a chance to loosen up a little and gives you a chance to show that you're going to be listening attentively to what they say—and that there are no wrong or right answers.

Don't hesitate to admit your ignorance about anything. Your role here is not to come across as an expert, but as a good listener.

Notice that she's not sure how much time she really spends on the Internet. Most people aren't. Don't worry. Accurate answers aren't important here. The main point here is just to get her talking and thinking about how she uses the Internet and to give you a chance to gauge what kind of user she is.

Well, at the office I spend most of my time checking email. I get *a lot* of email, and a lot of it's junk but I have to go through it anyway. And sometimes I have to research something at work.

Do you have any favorite Web sites?

Yahoo, I guess. I like Yahoo, and I use it all the time. And something called Snakes.com, because I have a pet snake.

Really? What kind of snake?

A python. He's about four feet long, but he should get to be eight or nine when he's fully grown.

Wow. OK, now, finally, have you bought anything on the Internet? How do you feel about buying things on the Internet?

Don't be afraid to digress and find out more about the user, as long as you come back to the topic before long.



I've bought some things recently. I didn't do it for a long time, but only because I couldn't get things delivered. It was hard to get things delivered, because I'm not home during the day. But now one of my neighbors is home all the time, so I can.

And what have you bought?

Well, I ordered a raincoat from L.L. Bean, and it worked out *much* better than I thought it would. It was actually pretty easy.

OK, great. We're done with the questions, and we can start looking at things.

OK, I guess.

## REACTIONS TO THE HOME PAGE

First, I'm just going to ask you to look at this page and tell me what you think it is, what strikes you about it, and what you think you would click on first.

For now, don't actually click on anything. Just tell me what you *would* click on.

And again, as much as possible, it will help us if you can try to think out loud so we know what you're thinking about.

The browser has been open, but minimized. At this point, I reach over and click to maximize it.



Well, I guess the first thing I notice is that I like the color. I like the shade of orange, and I like the little picture of the sun [at the top of the page, in the eLance logo].

Let's see. [Reads.] "The global services market." "Where the world comes to get your job done."



I don't know what that means. I have no idea.

"Animate your logo free." [Looking at the Cool Stuff section on the left.] "3D graphics marketplace." "eLance community." "eLance marketplace."



In an average test, it's just as likely that the next user will say that she hates this shade of orange and that the drawing is too simplistic. Don't get too excited by individual reactions to site aesthetics.

There's a lot going on here. But I have no idea what any of it is.

If you had to take a guess, what do you think it might be?

Well, it seems to have something to do with buying and selling...something.

[Looks around the page again.] Now that I look at the list down here [the Yahoo-style category list halfway down the page], I guess maybe it must be services. Legal, financial, creative...they all sound like services.

This user is doing a good job of thinking out loud on her own. If she wasn't, this is where I'd start asking her, "What are you thinking?"



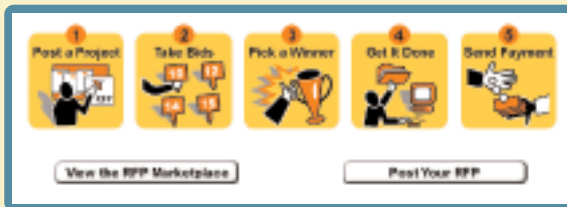
So I guess that's what it is. Buying and selling services. Maybe like some kind of online *Yellow Pages*.

OK. Now, if you were at home, what would you click on first?

I guess I'd click on that 3D graphics thing.

I'm interested in 3D graphics.

Before you click on it, I have one more question. What about these pictures near the top of the page—the ones with the numbers? What did you make of them?



I noticed them, but I really didn't try to figure them out. I guess I thought they were telling me what the steps in the process would be.

I ask this question because the site's designers think most users are going to start by clicking on the pictures of the five steps, and that everyone will at least look at them.

Any reason why you didn't pay much attention to them?

No. I guess I just wasn't ready to start the process yet. I didn't know if I *wanted* to use it yet. I just wanted to look around first.

OK. Great.

At this point, I would let her explore for a few minutes, following whatever links she's interested in and encouraging her to think out loud the whole time.

## TESTING A TASK

OK, now we're going to try something else.

Can you think of something you might want to post as a project if you were using this site?

Hmm. Let me think. I think I saw "Home Improvement" there somewhere. We're thinking of building a deck. Maybe I would post that.

So if you were going to post the deck as a project, what would you do first?

I guess I'd click on one of the categories down here. I think I saw home improvement. [Looks.] There it is, under "Family and Household."

So what would you do?

Well, I'd click.... [Hesitates, looking at the two links under "Family and Household."]

### Family & Household

Food & Cooking, Gardening, Genealogy, Home Improvement, Interior Design, Parenting, Pets, Real Estate...

[RFPs](#) | [Fixed-Price](#)

After a few minutes of "free range clicking," I give her a task to perform so we can see whether she can use the site for its intended purpose.

Whenever possible, I like to let the user have some say in choosing the task.

Well, now I'm not sure *what* to do. I can't click on Home Improvement, so it looks like I have to click on either "RFPs" or "Fixed-Price." But I don't know what the difference is.

Fixed price I sort of understand; they'll give me a quote, and then they have to stick to it. But I'm not sure what RFPs is.

As it turns out, she's mistaken. Fixed-price (in this case) means services available for a fixed hourly rate, while an RFP (or Request for Proposal) is actually the choice that will elicit quotes. This is the kind of misunderstanding that often surprises the people who built the site.

Well, which one do you think you'd click on?

Fixed price, I guess.

Why don't you go ahead and do it?

From here on, I just watch while she tries to post a project, letting her continue until either (a) she finishes the task, (b) she gets really frustrated, or (c) we're not learning anything new by watching her try to muddle through.



## What to do if you're observing

Being an observer at a usability test is a very cushy job. All you have to do is listen, watch closely, keep an open mind, and take notes.

Here are the types of things you're looking for:

- **Do they get it?** Without any help, can the users figure out what the site or the page is, what it does, and where to start?
- **Can they find their way around?** Do they notice and understand the site's navigation? Does your hierarchy—and the names you're using for things—make sense to them?
- **Head slappers.** You'll know these when you see them: the user will do something, or *not* do something, and suddenly everyone who's observing the session will slap his or her forehead and say, "Why didn't we think of that?" or "Why didn't we ever notice that?" These are *very* valuable insights.
- **Shocks.** These will also make you slap your head, but instead of saying "Why didn't *we* notice that?" you'll say, "How could she [the user] *not* notice that?" or "How could she not understand that?" For instance, you might be shocked when someone doesn't notice that there is a menu bar at the top of each page, or doesn't recognize the name of one of your company's products.

Unlike head slappers, the solution to shocks won't always be obvious and they may send you back to the drawing board.

- **Inspiration.** Users will often suggest a solution or the germ of a solution to a problem that you've struggled with for a long time. Very often the solution will be something you'd already thought about and rejected, but just watching someone actually encounter the problem will let you see it in a whole new light. And often something else about the project has changed in the meantime (you've decided to use a different technology, for instance, or there's been a shift in your business priorities) that makes an abandoned approach suddenly feasible.
- **Passion.** What are the elements of the site that users really connect with? Be careful not to mistake mere enthusiasm for passion, though. You're looking for phrases like "This is exactly what I've been looking for!" or "When can I start using this?"

In the course of any test, you'll also notice a number of things that are just not working like missing graphics, broken links, or typos. You should keep a list of these things so you can pass it on to whomever will fix them, but they're not what you're there to find, and you shouldn't let them distract you.

Here are some things to keep in mind when you're observing:

- **Brace yourself.** You may be disappointed by the users' reactions. Some people just won't get it. Some just won't like it. Some will get lost and confused, apparently without reason. It can be emotionally wrenching to watch someone have a negative reaction to something you've poured your soul into. The mantra you want to have in your head is not "It's not working!" but, rather, "What will it take to fix it?"
- **Don't panic.** Try to resist the temptation to jump to *any* conclusions until you've seen at least two users, preferably three.
- **Be quiet.** There's nothing more disconcerting for a test participant than the sound of laughter—or groans—coming from an adjoining room when she's having trouble using the site.
- **Remember that you're grading on a curve.** When a participant who uses the Internet two hours a day doesn't know how to type a URL, don't think, "Sheesh! What a dolt." Think, "How many people are there just like that out there? Can we afford to lose all of them as users?"
- **Remember that you're seeing their best behavior.** When you're watching a test you need to remember that people will tend to read Web pages much more thoroughly and put more effort into figuring things out in a test situation than they will in real life. After all, they're not under any time pressure, they're being paid to figure it out, and—most importantly—they don't want to look stupid. So when they can't figure something out, you have to realize that they're trying much harder than most people will and they *still* can't get it.
- **Pay more attention to actions and explanations than opinions.** Opinions expressed during user tests are notoriously unreliable. People will often exaggerate their opinions—positive *and* negative—because they think you *want* them to express strong opinions.

## Reporting what you saw

As soon as possible after the test, each observer and the facilitator should type up a short list of the main problems they saw and any thoughts they have about how to fix them.

You don't want to write a comprehensive report, more like an executive summary. Ideally you want the entire development team to read all of these lists (or at least scan them), so each one should be no longer than a page or two.

Here's an example of the kind of notes I usually write:

**USABILITY TEST NOTES: ELANCE.COM**

Steve Krug

June 1, 2000

- Everybody seemed to be drawn immediately to the “Cool Stuff” links at the top of the Home page, particularly “Animate your logo: Free!” It’s good that it engaged them, but after they were finished looking at the offer, they all seemed puzzled about how it related to the site.
- Two of the three users were unable to figure out what eLance was without some help. They figured it out eventually, but one of them said he wouldn’t have bothered if he wasn’t in a test. The wording of the main message still needs work.
- Everybody was unclear about how to get started. They all found a way, but they were uncertain and anxious along the way. There still may be too many entry points.
- Two users thought they understood the site, but they were puzzled by the Community tab. Is there another name we could use?
- The words “Buy” and “Sell” seemed to puzzle them. They weren’t sure whether to think of themselves as buyers or sellers.
- Two of the three users were confused by RFP vs. Fixed-price.
- They all liked the category listing. Seeing categories they were interested in right away on the Home page encouraged them to go on and find out more.