## Template: Usability Testing Notetaker Guide

Notetaker\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Time\_\_\_\_\_\_\_\_\_\_

Participant #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Sex: Male | Female

Country: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Introductory Script

Hi, \_\_\_\_\_\_\_\_\_\_\_. My name is \_\_\_\_\_\_\_\_\_\_\_. We’re asking people to give us feedback on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to see whether it works as intended. Thank you for agreeing to participate in this exercise. It will take about \_\_\_\_\_ minutes. Before we begin, I have some information for you, and I’m going to read it to make sure that I cover everything.

The first thing I want to make clear right away is that we’re testing the interface, 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.

As you use the interface, I’m going to ask you as much as possible to try to **think out loud**: to say what you’re looking at, what you’re trying to do, and what you’re thinking. This will be a big help to us.

Also, please don’t worry that you’re going to hurt our feelings. We’re doing this to improve the interface, so we need to hear your honest reactions.

If you have any questions as we go along, just ask them. 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 to help. But if you still have any questions when we’re done, I’ll try to try to answer them then.

Do you have any questions so far?

**Permission to Proceed**

Do you agree to participate in the usability test? Your input and responses will be kept confidential and will not be linked to your name or contact information. **Yes | No**

“I have described the usability test process to the participant and the participant voluntarily agreed to participate in the test.”

Print name of Person Obtaining Consent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   
Signature of Person Obtaining Consent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Consent Date \_\_\_\_\_\_\_\_\_\_\_\_\_

**Task 1**

*Insert a short* ***scenario*** *to set the stage for the usability tasks that you want your participants to conduct. The scenarios tell a short story of a specific user and what that user is trying to accomplish on the interface (website, mobile app, or other interface). These scenarios help the usability test participants put themselves into the shoes of the actual user and thus motivate them to engage with the interface. Good usability testing scenarios answer these key questions:*

* ***Who is the user?*** *You can consider such characteristics as age, gender, literacy, language, job function, etc.*
* ***What goal is the user trying to accomplish?*** *Identify what the user wants and what the user would need to find on your interface in order to leave satisfied.*

*Then explain what the usability* ***task*** *is: the action that you want the participant to take on the interface you are testing. Good usability test tasks should:*

* ***Be realistic.*** *Create tasks that a typical user would really try to do so that the usability test participant “owns” the task and you get the most useful information to help you improve your interface. Often that means that tasks should be somewhat broad, for example, asking a participant to find information on a topic rather than finding a specific document.*
* ***Be actionable.*** *Make sure you ask participants to do certain actions, rather than asking them how they would do something—you will often get different information by observing participants as they perform the action than when they describe their intended actions. For example, a good task would say, “Go to this website and find information about pandemics,” not, “You want information about pandemics. Go to this website’s home page and tell me what you would click on next.”*
* ***Avoid giving away clues about how to complete the task.*** *Try to avoid using terms in the task that are used on your interface that would bias the participant. For example, if the interface has a button that says “Sign up for our newsletter,” consider wording your task as “Find a way to received updates via email.” Also avoid describing preliminary steps that would give away information about how to use the interface. For example, avoid saying “Go to the website, sign in, and then look for X,” because the sign-in process may be a critical issue with the interface that might not emerge in the usability test if you give that information away.*

*Sample usability test scenario and task: Imagine you are a family planning provider helping a client decide on an appropriate contraceptive method that fits her needs. Before the provider can give the client her chosen method, the provider has to check if the client is medically eligible to use that method. This particular client has heard good things about hormonal implants and wants to use this method herself. Her medical history reveals the following: She is 35 years old, has 3 children between the ages of 2 and 7, and has high blood pressure. Use the ACE app to check whether she is medically eligible to use implants.*

|  |  |  |  |
| --- | --- | --- | --- |
| Pathway  (Circle chosen pathway or write alternate in Notes column) | Time to Completion | Success  (Circle your assessment) | Notes/Observations  (Note why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology) |
| * Insert Pathway Option 1 for successful task completion * Insert alternative pathway option for successful task completion, if applicable | **Time Started:** | 0  Not completed  1  Completed with difficulty or help  2  Easily completed |  |
| **Time Completed:** |
| **Total Time to Completion:**  (Time Completed – Time Started) |

**Task 2**

Insert scenario (if different than for Task 1) and usability task description.

|  |  |  |  |
| --- | --- | --- | --- |
| Pathway(s)  (Circle chosen pathway or write alternate in Notes column) | Time to Completion | Success  (Circle your assessment) | Notes/Observations  (Note why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology) |
| * Insert Pathway Option 1 for successful task completion * Insert alternative pathway option for successful task completion, if applicable | **Time Started:** | 0  Not completed  1  Completed with difficulty or help  2  Easily completed |  |
| **Time Completed:** |
| **Total Time to Completion:**  (Time Completed – Time Started) |

**Task 3**

Insert scenario (if different than for the previous tasks) and usability task description.

|  |  |  |  |
| --- | --- | --- | --- |
| Pathway(s)  (Circle chosen pathway or write alternate in Notes column) | Time to Completion | Success  (Circle your assessment) | Notes/Observations  (Note why was the user successful or not successful, e.g., wrong pathways, confusing page layout, navigation issues, terminology) |
| * Insert Pathway Option 1 for successful task completion * Insert alternative pathway option for successful task completion, if applicable | **Time Started:** | 0  Not completed  1  Completed with difficulty or help  2  Easily completed |  |
| **Time Completed:** |
| **Total Time to Completion:**  (Time Completed – Time Started) |

*Thank you! This was very helpful. Do you have any comments or questions that I can answer?*

**Usability Testing User Cards**

Instructions: Cut out each cell and paste onto the front and back of index cards. (Each table row is for one index card.) Provide these printed cards as a reference for testers as they complete each task.

|  |  |
| --- | --- |
| **Task 1: Insert brief description** | Insert scenario.  **Insert task.** |
| **Task 2: Insert brief description** | Insert scenario.  **Insert task.** |
| **Task 3: Insert brief description** | Insert scenario.  **Insert task.** |