

How to Lead a User Testing session



User Testing is the process of preparing a set of tasks from your product for a hand-picked group of participants to complete, under your supervision, so that you can gain insight into how your product is used, and where your audience's struggles might be.

For example, if your product had a shopping component, some of those tasks you'd give your participants could include asking them to find a particular item for sale, find reviews of it, or negotiate the product's checkout process.

Effective User Testing will allow you to gain invaluable insights into how your users interact with your product. My hope is that this PDF will equip your business to get started with User Testing, in a way that will help you avoid common pitfalls, and get on the road to effectiveness right from your very first test.

You're welcome to share this PDF within your business. However, it might prove even more beneficial to those in your business that might benefit from this information if you instead share the article this PDF came from, "[How You Can Use User Testing to Quickly Find Weaknesses In Your Product](#)". Doing so will allow them to gather a great deal more information about why your business is on this journey, get this PDF, and get other great content that will help better their skills in this field.

I'm going to break down the process of conducting an effective User Test into key sections of testing, so that you can refer to them easily in the future. We'll start with knowing when to test, as the timing of your test can have as much impact as what you want to test, depending on the conditions of your product and your audience. We'll then cover how to know who you should be using as participants, and how to maximize those incentives to participate.

Like the saying goes, if you're given six hours to cut down a tree, spend four sharpening your axe. Having the right equipment and methods for preparation are important parts of leading an effective User Test, so we'll go into detail about how to prepare for your tests. Finally, we'll cover running the actual test, and how to prepare the data you gather for your business to read and understand.



Know when to test

The first step in conducting an effective user test is knowing when to conduct the test to begin with. If your product is about to be totally overhauled, for instance, optimizing for it may not prove as useful as if you were to do the test right after the new version is launched. The purpose of the test is to lead you to make educated decisions on your product, so be sure that the data you gather will be able to apply to the product's future.

Decide on a specific area of the product to test. Going broad in one test could arguably prove useful in an initial early test, where no previous data has been gathered, but for truly insightful data, it's a good idea to focus on specific parts of the product so that you can discover the nuances you're really looking for. For example, asking a test participant to negotiate the checkout process of a shopping site, rather than simply using the whole site, you'll be able to assign their energy to that specific part of the site, and get more detailed information about that section. They might be more inclined to mention they're not quite sure how to

change the default shipping address, for instance, rather than just breezing through the checkout process with all the defaults selected.

It's also important to decide where to do your test; this will be influenced by which test type was chosen from the article this PDF came from, "[How You Can Use User Testing to Quickly Find Weaknesses In Your Product](#)".

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Who to test

We cover three methods of testing in the aforementioned article. Curating your own list of participants is only actually required in one of those three methods, but it's an important part of the process nonetheless.

You could technically use anybody as a participant, however the likelihood of just anybody closely matching your product's target audience are slim, especially if you serve a niche audience. The best participants are ones that either use your product, or are in the market for your product. These users, or prospective users, will ultimately be the kinds of people that will determine whether your product is successful or not: they're the ones that you need to delight with your product, and they're the ones that need to understand how to use your product.

"The maximum benefit-cost ratio is achieved when using between three and five subjects" writes Jakob Nielsen.

Five eventual participants is a sufficient sample size to gather valuable data in your user test. While more data often results in more accurate results, five participants will be able to catch a spectrum of responses without dragging the test out over time and over budget. The ability to rapidly test and iterate over data which is helpful today, is significantly more useful than a single set of data applicable only to old iterations of your product.

As you curate your list of prospective participants, remember that people can be flaky. To get five participants, it's worthwhile gathering more than five ahead of your test, encase some of them back out. It happens, even if you're tapping on an audience of fans. Offering a small gift card as a thank you goes a long way towards encouraging participants to be open to the idea of taking future tests, which you may want to do from time to time, alongside new participants.

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Equipment for Testing

One of the many great things about User Testing is that it can be done without any real investment in equipment. The specifics will depend on the kind of product you have available, though.

For desktop or web products, you could use Skype or Google+ Hangouts on a laptop with a camera (most do these days). Both tools are free, and both allow you to record both the participant's face and their computer's screen at the same time. This way, you can capture the participant's actions and their reactions to those actions. It likely goes without saying, but don't forget to record your sessions!

For iPhone apps, [UX Recorder](#) is a great app that achieves similar functionality for mobile, for \$1.99 per recording. There are many like it, on many platforms, and since the app options change so rapidly, I'd encourage you to look over your options at the time your test begins.

Spend a few moments considering where you'll situate yourself; a quiet room in your office, for example, with good lighting.

If your participants are meeting you in person, consider a tool such as Silverback for screen / video recording, and use familiar technology for your participants to use, such as a mouse, to be sure everyone is at least familiar with the input methods.

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Preparation

Ahead of any User Testing, it's important to prepare what you'll be covering and how you'll be covering it in advance. Preparation should include sitting down with your team and agreeing on your testing goals, the types of questions you'll be asking, and a pilot run of your test, to assure everything goes as intended.

As you discuss with your team what you would like to achieve from your test, be sure to be specific. General goals such as “make sure people can use the product” are far too broad. Look for more specific goals, such as “can be checkout process be confidently completed under four minutes”, so that your test data will be measurable against something.

Decide on the questions and activities you'll be asking your participants to complete, in response to your goal. Plan the methods you'll use to learn the answers to your questions using those questions and activities.

Keep these team meetings to an hour or below; don't let it drag on and become a thing. Establish the goals, decide how you'll go about it, and get moving. Choose a single person to lead the test, whether from the team or an outside specialist in user testing.

Document the interview questions you might want to ask, prompts for follow up questions, closing statements, post-test questions. Do script it out, but do leave room for notes alongside the questions. Each test will be slightly different, so keep your notes short so they can be glanced at and used as appropriate. There'll be little time to read script while conducting the actual test.

While it's all fresh in your mind, some 24 hours before the first test, do a dry run with a team member to make sure all goes to plan. Assure the flow is smooth, equipment works correctly and is set up correctly. Review the output and check for background noise, distractions, or lighting issues. Timing is important - be sure to practicing your timing, and remember to keep track of your time. Ask a team mate to observe and nudge you along if you get off track.

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Running the Test

It's important to make the participant feel comfortable ahead of user testing, and to set the expectations. To get real data from your participants, it's important to let them know that you're not testing them, but the product. There are no hurt feelings, on the contrary, their input is invaluable. If you're meeting them in person, welcome them warmly and be sure to provide them with a waiting area if they happen to arrive early. It's important that you make your participants feel comfortable; they're experiencing your product in this time.

Before you even begin talking about your test, don't forget to cover any formal procedures you may need to complete, such as NDAs, consent forms or anything else that's legally required in your particular situation. Have these ready ahead of your participant's arrival.

Let your participants know that you need them to share everything aloud - all thoughts, feelings, to the best of their ability. Let them know that the test is short - all thoughts count and should be shared aloud.

It's important that you don't answer any questions during the test. You ask them to complete actions, and as long as they understand the task, it's up to them to complete it. If they can't work it out themselves, it's a fail on behalf of the product. You won't be there to answer their questions in the real world.

If your product is an app, you might want to consider simulating the discovery and installation of the app. For example, if there's a SMS link to download, or if it's available from an App Store, the whole process can be evaluated, depending on your testing goals.

Consider asking what their particular use cases are for the app, how it applies to their lives. This general data will help define your audience as you move forward, which will help you understand context for their motivations and expectations.

If the participant quietens down during the test, while you won't be answering questions, you can ask questions to spur them along. For example, "do you know what's happening here?" or "what do you think the product has done with that information?"

Watch for any areas of hesitation, task failures, different flows from what you expected and for areas of your product which were ignored. More information on how to pull useful data from your testing can be found in the article this PDF was acquired from, "[How You Can Use User Testing to Quickly Find Weaknesses In Your Product](#)".

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After the Test

After the user test is complete, it's a great idea to offer the participant the opportunity to share thoughts, outside of any particular task. Giving them the chance to voice their opinions about the experience they had with your app allows them to reflect on what happened, what they liked and didn't like, which again may provide additional insight. Real world users don't stop using your product when they stop using your product - the impression that's left with them stays with them, and these post-test thoughts may give you some insight into that impression.

It's important to end your test on time. You don't want your tests to run into each other, and you want to respect your participant's time. It's also important that you get a short break between tests, so that you remain on your A-game throughout.

It likely goes without saying, but be sure to thank your participants, and take the opportunity to provide them with any gifts or potential repeat opportunities you may (or may not) have for them.

Follow up with them after the test with another ‘thank you’ using your audience’s method of choice, whether it’s email, social media, or via your product, if that’s applicable and/or appropriate.

After you’ve made sense of your data, as identified in the article this PDF was acquired from, “[How You Can Use User Testing to Quickly Find Weaknesses In Your Product](#)”, you’ll be in great shape to get your team educated on how everything went.

Take the User Testing Report included with this PDF and fill it in with your test findings. This should save you lots of time in gathering your data, your thoughts on the data, and it should narrow the gap between testing and sharing your findings with your team. Ideally, presenting the data within 2-3 days of the tests will make sure your team remains excited in the results, and that everyone will still be ready to move quickly following the presentation.

Once the user testing report is complete, schedule a viewing party, either in a physical space or over Skype/Hangouts/etc. Either distribute materials or present digitally, whichever is appropriate to your viewing party setup, and let everyone see what you’ve learned from your test.

The summary in the report should follow a similar format to the report provided, aggregating responses from the audience in a way that’s easy to understand at a glance. The chart also helps people to digest the

types of valuable content you received in a digestible form. Ultimately, the goal of this report is to communicate the results of the testing as efficiently as possible.

During the viewing party, make an effort to capture everyone's insights and ideas. While this party isn't a scenario where you want to be trying to solve the problems one after the other, it's a great opportunity to jot down the initial feedback and thoughts of your team, ahead of assigning the problem solving. Combine everyone's ideas and insights so that the problem solving process can benefit from that information as well as the user testing data.

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Conclusion

Congratulations, you've successfully led your business through a user test! It's not easy, but by having using this PDF as your guide, you'll gain huge amounts of invaluable information from your audience over the coming years of your product, and of future products, too.

If you've enjoyed this article, or found it helpful, please head back over to the article this PDF comes from, "**How You Can Use User Testing to Quickly Find Weaknesses In Your Product**" and leave a comment letting others know it was valuable to you. We'd also really appreciate any social shares you can give that article, to let your colleagues and peers know you loved the content.

There's lots more content coming over on FairheadCreative.com. As a team with experience in both online business and user experience, the site teaches business owners how to create engaging, memorable experiences between their businesses and their target audiences, in language they'll understand. It's a world of knowledge that you, as a

business owner, may never have encountered before. Your competition may never have encountered it, either.

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