

Alpha Usability Testing Guide

This guide is designed to help a team conduct an alpha usability test after identifying the objectives, identifying the approach and preparing testing materials. It contains guidelines that should be adjusted according to test conditions, objectives and team member's level of experience. Components of the guide can be used as checklists during test sessions as well as preparation materials for all people involved in a test.

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Facilitator Guide

Greeting and Reassuring Users

Users typically feel like they are being tested, when they are actually helping to test course objectives or an application's interface. Therefore, it is very important to reassure users right when they begin and conclude the session. Here are some sample points to make:

- Thank them for coming and helping to evaluate
- Remind them that they are not being tested. They are helping you understand how to design and build training that allows them to complete their daily tasks
- You asked them to come because they represent other users just like themselves. It takes testing to develop high-quality training, and they are helping you find ways to modify and improve the current layout
- All comments and results will be kept confidential and anonymous
- The testing session should last about an hour and half
- Give user a pre-use form
- Evaluate pre-use form.

Instructions and Prompts to speak out loud when running the session

Explain the following points to the user:

- You are interested in what they think, so you want them to talk out loud as you explore them.
- Try to say whatever is on your mind at the time you are thinking it
- Don't hold back on feelings, guesses, expectations, intentions, frustrations, and successes
- Speak as continuously as possible. Don't worry about complete sentences
- Don't censor your thoughts. Say both the positive and negative things you are thinking
- Your frankness will help us most

During the session - do not lead or bias the user, do not say:

- What's bothering you?
- Can you describe what you do not like?
- It seems like you really liked that last part, is that true?

If user stops talking you can try any of the following:

- Please describe what you're thinking or feeling.
- Tell me what you like and dislike.
- Tell me what is difficult or easy to use (GUI) or follow (course structure).
- Would you explain further?
- Is this what you wanted?
- What were you expecting?
- Is there anything else?
- I don't understand.

Common pitfalls and problems during sessions:

Facilitator asks user what they were expecting too soon. Users should provide feedback on things that they see or make happen. Avoid putting the user into the position of the designer. The goal of facilitation is to gather reactions and areas of improvement. Most users are not designers; try to avoid asking overwhelming questions. Instead, make a note about areas to bring up during the debriefing.

User gets sidetracked into organizational change or change issues (new training course, changes to their job etc.). Users are sensitive to changes, especially in what they do or training they took in a particular way in the past and believe was effective - be aware and sensitive of this. As a facilitator, try to strike a balance between letting the user voice reactions and refocusing them on the tasks at hand.

Absolutely never explain why something is designed a particular way. No one should defend a design at any point during a test. The user may ask, "Why does that work that way?" The facilitator should respond, "What did you want to see happen there?", or "How do you want it to work?".

Although we commonly use the term "test" - try to avoid using the word in discussions with the user. Try to use the word "session" instead.

Debriefing the Alpha Usability Test

- Give the user post-use form (see sample)
- Thank the participant for their efforts
- Ask the participant for general comments, thoughts and feelings?
- Ask the participant what they liked
- Ask the participant what they disliked
- Ask specific questions based on session objectives
- Invite all observers to ask questions
- Summarize and thank the participant

Concluding the Session

Collect index cards from *everyone* - force people to put down recommendations before they leave the room. When the user completes the post-use questionnaire all observers should be reviewing their note cards and filling in any missing recommendations. Do not let anyone walk away with cards or convince you they will add recommendations later. Making recommendations is a fast process - if it takes more than a few minutes it is being done wrong, the value of this testing approach is the fast turn-around time.

Debrief everyone involved. Gather observer reactions and have a mini-brainstorm session. Take notes during this session, it should last no more than 15 minutes.

Observer Guide

Rules of Observation:

- Keep a poker face during the course of the session.
- Avoid both positive and negative reactions to user actions or comments
- Do not make noises, exclamations or sighs during the session
- Do not arrive late and interrupt the test - if you are late you miss the test
- Do not leave the room during the test, plan on attending the entire session

Your Mission:

Your role is to observe and take notes. Problems are recorded on index cards - one problem per card. This may feel like a waste of index cards but will help tremendously during the analysis process. During a session you should be taking approximately 3 cards per minute. The index card format is as follows:

Title (summarize the problem) Problem: S1: Suggestion 1 S2: Suggestion 2 S3: Suggestion 3

Note-Taking Guidelines:

- One problem per card - this is essential to the analysis process
- Do not worry about handwriting
- Do not worry about complete sentences and abbreviations
- Do not worry about getting every point recorded - there should be between two and three observers taking notes
- Do not walk away from the test with your cards - the facilitator will collect all cards after the test

During the test you will have questions or need clarification from the user on particular points - do not interrupt with these during the conduct. Note them and during the debriefing when the facilitator invites everyone to ask questions bring up your points.

During the test you should be noting problems that originate with the user actions or reactions - not things that you yourself note and feel should be done differently. Although these are important, the note cards should reflect data actually observed. Personal observations should be noted separately.

Recommendations may originate from the user or from you. Try to jot down a few recommendations. At the end of the test when the user completes the post-use questionnaire you will have a chance to finish these. You will not be allowed to leave the room with the cards and complete your recommendations later.

Analysis Guidelines

A few people who attended testing sessions should help the facilitator with the analysis process.

1. Sort the index cards according to title. This should result in many piles of problem areas.
2. Distribute the piles among the people doing the analysis.
3. Each person should review their piles of cards and sort them down to different levels of detail. For example:
 - Level 1 - Not aligned to stated objective
 - Level 2 - Out of sequence
 - Level 3 - Boring
4. One person should summarize the pre-use and post-use questionnaires.
5. Merge the three analysis documents and questionnaire summaries - combine levels as appropriate.
6. Have a meeting to prioritize items and discuss solutions with management for top priority items.
7. Identify modifications to be made and assign responsibility to the appropriate team members.

Sample inputs and outputs

A. *Presentation*

Facilitator meets user and positions session. User is given slides, facilitator uses notes version of slides to quickly review key points. Facilitator answers any questions user has and builds rapport with users.

B. Pre-use questionnaire and background reading

Following the presentation, the user is asked to complete a pre-use questionnaire. The user is also given any background materials that s/he needs to read before starting. The user is left alone to complete the questionnaire and read that materials.

Pre Use Questionnaire	
How many years have you been with SFA U?	_____
Describe your experience:	_____ _____ _____ _____
What is your X experience?	? Power user ? Experienced (more than six months) ? Novice (one to six months) ? Took Windows training ? No experience
Have you ever taken X training?	? Yes ? No
Describe:	_____ _____ _____ _____

C. Post-use questionnaire

Following the test, the facilitator asks the user to complete a questionnaire. Following this the facilitator asks pointed questions concerning the usability test objectives (this includes any questions designed to assess if learning objectives were accomplished). The floor is opened to all observers and test participants to wrap-up the debriefing.

Post Use Questionnaire	
Activity _____	
How did you like the course?	<input type="radio"/> Very Satisfied <input type="radio"/> Satisfied <input type="radio"/> Neither Satisfied nor Dissatisfied <input type="radio"/> Dissatisfied <input type="radio"/> Very Dissatisfied
Do you think this course was “easy” to complete?	<input type="radio"/> Very easy <input type="radio"/> Easy <input type="radio"/> Indifferent <input type="radio"/> Difficult <input type="radio"/> Very Difficult
Do you think you completed this course:	<input type="radio"/> Very Quickly <input type="radio"/> Quickly <input type="radio"/> As quickly as you expected <input type="radio"/> Slowly <input type="radio"/> Very Slowly
Did you feel that the number of modules required to complete the course were:	<input type="radio"/> Too many <input type="radio"/> Many <input type="radio"/> About what you expected <input type="radio"/> Few <input type="radio"/> Too few
Please rate the course structure:	<input type="radio"/> Dislike <input type="radio"/> Dislike somewhat <input type="radio"/> Neutral <input type="radio"/> Like somewhat <input type="radio"/> Like
Please list the three best features of the course:	Please list the three worst features of the course:
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
THANK YOU!	

D. Analysis Document

An analysis document is constructed based on the observer index cards. The purpose of this analysis document is to capture potential areas of improvements, modifications or problems and all potential solutions. The document doesn't reflect overall user reactions and whether or not the test went "well." The analysis document is organized such that items can be quickly prioritized and handed off to the appropriate designers and developers.