Contents

Foreword xv
Acknowledgments xvii
About the author xix
Image credits and permissions xxii

Introduction: Getting started guide 1
Usability is invisible 1
U R usability 3
How to use this book 3
   Special features you can use or skip 5
   A few words about words 6
But wait, there’s more on the companion website 7

1 Establishing the essentials 9
Focus on the user, not the product 10
Start with some essential definitions 10
   Defining usability 11
   Defining usability testing 13
Know when to conduct small studies 17
Know how to conduct small studies 18
   Define the user profile 18
   Create task-based scenarios 19
   Use a think-aloud process 19
   Make changes and test again 19
Know when to conduct large studies 20
Think of usability testing as hill climbing 21

2 Testing here, there, everywhere 25
Testing in a lab offers some benefits 26
   The bare essentials for testing in a lab 27
   Other equipment that’s nice to have 27
Specialized equipment you might need in certain situations 28
Formal labs can cost a lot, or not
Informal labs can be set up anywhere at very little cost
Field testing gets you into the world of your users
Advantages of field testing
Disadvantages of field testing
Remote testing extends your reach to your users
Moderated remote testing is synchronous
Unmoderated remote testing is asynchronous
New methods push the envelope on remote testing
Choosing the right method is a balancing act

3 Big U and little u usability
Introducing big U and little u usability
Using a user-centered design process
Opening your toolkit and seeing what's there
  Analysis tools
  Development tools
  Post-release tools
Choosing heuristic evaluation from the toolkit
Conducting a heuristic evaluation
  Conducting a formal evaluation
  Conducting an expert review
  Conducting an informal evaluation
Comparing the results from heuristic evaluation and usability testing
Putting both methods together: The 1–2 punch
Cost-justifying usability
Case Study: Heuristic evaluation of Holiday Inn China website

4 Understanding users and their goals
People are goal-oriented
When people use the web, they bring their experience and expectations
  People expect web objects to be in specific places
  People don’t want to read—they want to act
  Make a good first impression—you might not get a second chance
  Generational differences matter when it comes to the web
Personas help you get to know your users 94
   Personas are based on real information about real users 94
   Personas are a creative activity, but don’t get carried away 97
   Personas should be a manageable number 98
   Personas need to be visible 98
Scenarios tell the story of your users’ goals 99
   Start by knowing the difference between a task and a goal 99
   Tell stories about your personas in a compelling way 100

5  Planning for usability testing 105
   Scheduling the planning meeting 106
      Establish test goals 107
      Determine how to test the product 111
      Agree on user subgroups 116
      Determine participant incentive 122
      Draft the screener for recruiting participants 124
      Create scenarios based on tasks that match test goals 128
      Determine quantitative and qualitative feedback methods 136
      Set dates for testing and deliverables 138
Writing the test plan 142
      Writing an informal test plan 143
      Writing a formal test plan 145
Case Study: Test plan for Holiday Inn China website usability study 148

6  Preparing for usability testing 157
   Recruiting participants 158
      How to do the recruiting yourself 158
      How to recruit through an agency 160
      How to plan for no-shows 161
Assigning team roles and responsibilities 162
Developing team checklists 163
Writing the moderator’s script 167
Preparing or using other forms 170
      Preparing a video consent form 170
      Preparing a special consent form for testing with minors 171
      Using a non-disclosure agreement 172
      Preparing an observer form 172
Creating questionnaires 173
    Creating a pre-test questionnaire 173
    Creating post-task questionnaires 176
    Creating a post-test questionnaire 176
Using standard post-test questionnaires 181
    Using the SUS 182
    Using the CSUQ 183
Creating or using qualitative feedback methods 185
    Using product reaction cards 185
    Ending with an interview 187
Testing the test 188
    Conducting the walkthrough 188
    Conducting the pilot 189
Case Study: Sample test materials for Holiday Inn China website usability study 193

7 Conducting a usability test 199
Setting up for testing 200
Meeting, greeting, briefing 200
    Meeting and greeting the participant 201
    Conducting the pre-test briefing 201
    Preparing the participant to think out loud 205
Being an effective and unbiased moderator 207
    Monitor your body language 207
    Balance your praise 208
    Ask “good” questions 209
    Know how and when to intervene 214
    Administer post-test feedback mechanisms 216
Managing variations on the theme of testing 218
    Testing with two or more participants 218
    Testing with two or more moderators 219
    Testing remotely with a moderator 220
Providing help or customer support during testing 223
Logging observations 225
Handling observers and visitors 226
    Observers with you and the participant 226
    Visitors in the executive viewing room 228
    Remote observers 230
Working solo 230
Case Study: Session log from Holiday Inn China website usability study 234
8 Analyzing the findings

What did we see?  240
  Gather input from everyone  241
  Collect the top findings and surprises  241
  Choose your organizational method  242
What does it mean?  249
  Determining who should do the analysis  249
  Collating the findings  250
  Presenting quantitative data  251
  Working with statistics  252
  Analyzing questionnaires  256
  Using qualitative feedback from the think-aloud process  258
  Collating responses from the product reaction cards  259
What should we do about it?  259
  Triangulating the data from findings  260
  Characterizing findings by scope and severity  261
  Making recommendations  265
Case Study: Findings analysis from Holiday Inn China website usability study  270

9 Reporting the findings

Following Aristotle’s advice  279
Preparing the message for the medium  279
Writing an informal memo report  280
Writing a formal report  283
  Preparing the parts of a formal report  283
  Writing the executive summary  285
  Organizing the rest of the report to match your audience needs  285
Presenting the findings  289
  Using tables to summarize the findings  291
  Illustrating the findings  293
  Ordering the findings  299
Presenting post-task and post-test results  300
  Presenting survey responses  301
  Presenting SUS results  302
  Presenting qualitative responses  303
Making recommendations  304
Presenting an oral report  307
  Plan your presentation  308
  Prepare video clips  309
Practice, practice, practice 310
Deliver your presentation 311
Know how and when to ask for questions 311
Advocating for more UCD 312
Case Study: Report of Holiday Inn China website usability study 315

10 International usability testing 319
Learning about your international users 320
  Some international users are here 320
  Other international users are “there” 320
Understanding cultural differences 324
  Books to learn more 324
  Articles to learn more 324
Applying the work of Hall and Hofstede to understand international users 331
  Hall’s concept of high-context and low-context cultures 331
  Hofstede’s concept of five cultural dimensions 332
Planning for international testing 334
  Where to test 335
  How to test 340
Structuring the test protocol 342
  Localizing the scenarios 342
  Localizing the questionnaires 343
  Scheduling single sessions or co-discovery sessions 346
  Choosing think-aloud or retrospective recall 346
Selecting the moderator 346
Anticipating other aspects of international testing 348
  What if the participant arrives with someone else? 348
  Should more time be set aside for meeting and greeting? 349
  Should breaks be longer between sessions? 349
  Can you interpret nonverbal communication cues? 350
Case Study: Analysis of the UPS Costa Rican website 353
References 355
Index 367