Praise for *Usability Testing Essentials*

“Have you been inspired to try usability testing, but not sure exactly how to go about it? Carol Barnum’s book will take you step-by-step through all you need to do. Plus, she gives you a solid background in the context and history of testing—and adds a valuable chapter on international testing. Carol is highly regarded as a teacher, an academic, and a practitioner, and all three of her roles shine through in this book.”

—Caroline Jarrett, User Experience and Usability Consultant, Effortmark Limited, author of *Forms that Work*

“Carol Barnum’s *Usability Testing Essentials* delivers just what the title promises. Readers who are new to usability studies will find here all they need to know to design and execute a test, analyze the test data, and provide an effective report with recommendations for clients. But even usability experts will find the book chock full of ideas, insights, and suggestions that will improve their practice and their teaching in this increasingly important area of study. Barnum’s expertise on the subject shines through on every page, but the book’s greatest strength is its careful attention to analyzing test results—a topic that earlier texts have tended to gloss over much too quickly.”

—George Hayhoe, PhD, Mercer University School of Engineering

“*Usability Testing Essentials* will guide you through both conducting a usability evaluation and making the decisions that will make it a useful and effective part of any user experience project. Carol Barnum places usability evaluation into the larger context of user-centered design. It is a valuable resource for anyone getting started in usability and an excellent companion to both *Letting Go of the Words* and *Forms that Work*.”

—Whitney Quesenbery, WQusability

“Carol Barnum has done a wonderful job of distilling her research, consulting, and teaching experience into this very lively, practical book on how to do usability testing. You get up-to-date, step-by-step help with lots of variations to suit your own situation. You see each part in action through the running case study. If you have a global market, you’ll especially want to review Chapter 10 on international usability testing. This is a great addition to the usability toolkit.”

—Janice (Ginny) Redish, charter member of the UPA, author of *Letting Go of the Words: Writing Web Content that Works*

“Carol is a rare breed, both an academic and a practitioner. Her voice of experience comes across clearly, backed by references that illustrate where and who our methods came from. Newcomers to usability testing will find a solid introduction; while those more experienced will find unexpected insights into the field.”

—Carolyn Snyder, Snyder Consulting
Usability Testing Essentials

Ready, Set...Test!

Carol M. Barnum
For Carolyn, George, Ginny, and Whitney

with deep appreciation for your insights, encouragement, and vision for what this book could be
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- Gather input from everyone  
- Collect the top findings and surprises  
- Choose your organizational method  

What does it mean?  
- Determining who should do the analysis  
- Collating the findings  
- Presenting quantitative data  
- Working with statistics  
- Analyzing questionnaires  
- Using qualitative feedback from the think-aloud process  
- Collating responses from the product reaction cards  

What should we do about it?  
- Triangulating the data from findings  
- Characterizing findings by scope and severity  
- Making recommendations  

Case Study: Findings analysis from Holiday Inn China website usability study

## 9 Reporting the findings

Following Aristotle’s advice  
Preparing the message for the medium  
Writing an informal memo report  
Writing a formal report  
- Preparing the parts of a formal report  
- Writing the executive summary  
- Organizing the rest of the report to match your audience needs  

Presenting the findings  
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In 2008, I decided to put together a panel at the annual conference of the Usability Professionals' Association. The topic was Discount Testing by Amateurs: Threat or Menace?

At the time, I was about to go out on a limb by writing a book based on the premise that everyone involved in creating websites should be doing their own usability testing.

Not surprisingly, the idea of amateurs doing the work of professionals was viewed by some members of the usability community as a potential threat to full employment and high standards, although these concerns were rarely discussed in public. So I thought it would be a good idea to bring the debate out in the open—preferably before I spent what promised to be a painful year writing my book.

Randolph Bias kindly agreed to take the contrary position (“Testing by amateurs is a very bad idea for many reasons”), but we needed someone to sit in between us and argue for a sensible, balanced viewpoint. It had to be someone very smart, with a lot of credibility in the profession. I immediately thought of Carol Barnum.

To help people get in the spirit of the thing and hopefully take sides, we even made up a series of buttons with inflammatory phrases like: “Steve, you ignorant slut!” and “Randolph, you ignorant slut!” Carol’s button was easy to write.

Even though I’ve had the pleasure of knowing Carol for more than a decade, I think I first started thinking of her as the voice of reason in

---

2 References to a Dan Aykroyd catchphrase (“Jane, you ignorant slut”) from an old *Saturday Night Live* sketch where he and Jane Curtin are news analysts whose debates are, well, acrimonious.
2002 when I read a paper she’d written about one of the perennial questions in our field: How many participants do you need in a usability test to discover most of the problems?³

In it, she took an argument that threatened to go on forever and finally made sense out of it, recapping all the research (some of the most insightful of which was done by her own students at Southern Polytechnic), neatly summarizing the various viewpoints, and drawing what I thought were incredibly insightful conclusions.

Ever since then, she’s been one of my go-to people when I need a sounding board on usability-related issues.

You may be wondering why I’m here recommending Carol’s usability testing book if I just published one myself. But mine is a very short book that only covers the basics of one “flavor” of testing. I was ruthless in leaving out whole topics—important topics—because I had a very specific objective: to get people started.

But I only felt free to be this ruthless because I knew that once people got a taste of usability testing they’d want to know more, and I could point them to books that do go into detail on all the important topics.

And even though Carol’s book wasn’t written yet, I included it in my list of recommended reading anyway (a very short list—I only recommend books that I think are excellent) because I knew it would be one of the best.

I’m glad it’s finally here. And I’m glad I was right: it’s excellent.

I knew it would be.

Steve Krug
Brookline, Massachusetts

A book does not spring to life like spontaneous combustion. It smolders for years, taking on energy from the world around it. Then it finally bursts into flame. The energy I have gotten from the many people who have helped light the spark and keep the fire going for this book comes from my many students in usability testing courses at Southern Polytechnic and in workshops and training sessions for usability practitioners around the world. In addition, energy comes from my clients in the Usability Center at Southern Polytechnic, who have partnered with me in pursuing a common goal of understanding their users’ experience.

I am grateful for all the insights I have gotten from teaching and working with clients and their users and for the samples I can share from client and student projects. I have included as many of these samples as space permits in this book. And there’s more on the book’s companion website.

For the excellent feedback I received on the proposal for this book, I wish to show my appreciation to my reviewers: Laura Downey, George Hayhoe, Mike Hughes, Caroline Jarrett, Katie Leonard, Ginny Redish, Alison Reynolds, and Whitney Quesenbery.

For my dear friend and colleague, Steve Krug, who generously agreed to write the Foreword, I cannot adequately express how much I appreciate his contribution. It should come as no surprise to those of you who know Steve and his work that he would want to do the Foreword. Still, it surprised, pleased, and touched me.

And for the amazingly thorough, instructive, informative, challenging, and insightful reviews I received from my four colleagues for the chapter-by-chapter review of the book—George Hayhoe, Whitney Quesenbery, Ginny Redish, and Carolyn Snyder—I am deeply grateful, so much so that I have dedicated the book to them. The book you are reading would not be the book it is were it not for the vision of these colleagues and friends in helping me see the light.

And to Morgan Kaufmann—particularly Mary James, David Bevans, Marilyn Rash, and Rachel Roumeliotis—for shepherding me through the process: thanks for all your support.
Carol Barnum became a usability advocate in the early 1990s. It happened when she heard (and saw) the word “usability” in a session at a Society for Technical Communication conference. Technical communicators have always seen themselves as the user’s advocate, but here was an emerging discipline that championed the cause of the user!

It was love at first sight.

In 1993, Carol attended the second Usability Professionals’ Association conference, where she was thrilled to mix and mingle with several hundred usability folks on Microsoft’s corporate campus. Those two conferences sparked a desire to combine her love of teaching people how to be clear communicators with a new-found passion for helping companies understand how to promote good communication between their products and their users.

In 1994, she opened her first usability lab in a windowless basement at Southern Polytechnic State University. Since then, Carol has relocated and rebuilt the lab into a great three-room complex, with plenty of light and plenty of room for a team in the control room; visitors in the executive viewing room; and, of course, participants in the participant room. Working with many different clients over the years, she has greatly enjoyed helping them unlock their users’ experience with software, hardware, documentation and training products, mobile devices, web applications, and, of course, websites.

In addition to being the director of the Usability Center, Carol directs the graduate programs in Information Design and Communication at Southern Polytechnic and teaches a variety of courses, including usability testing, information design, and international technical communication.

Carol is a sought-after speaker and trainer, receiving the top presentation prize at the first European Usability Professionals’ Association conference, and top ratings at UPA, STC, and IEEE’s Professional Communication
conferences. She has traveled the world—England, Ireland, New Zealand, Australia, China, and India—speaking about usability testing. And closer to home, she was an invited keynote speaker at the World Conference on e-Learning in Quebec, Ontario, and at World Usability Day at Michigan State University.

She is the author of five other books and numerous articles and book chapters covering a variety of topics, including the impact of agile on usability testing, the “Magic Number 5” and whether it is enough for web testing, using Microsoft’s product reaction cards for insights into the desirability factor in user experience, e-learning and usability, and issues affecting international and intercultural communication and information design.

Carol’s work has brought recognition from the Society for Technical Communication (STC), including the Rainey Award for Excellence in Research, the Gould Award for Excellence in Teaching Technical Communication, and the designation of Fellow. Her first book on usability testing won STC’s highest-level international publications award. Carol served seven years on the Board of Directors of STC and is also a founding member of the editorial board of the *Journal of Usability Studies*. 
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Introduction:
Getting started guide

Usability is invisible

Do you love your mobile phone? Your MP3 player (you know the one)?
Your e-book reader? Your laptop or tablet PC? Your search engine of
choice? Your GPS system (or the application in your smart phone)? Your
bank’s online banking application or its ATM?

There’s a reason for that. Usability.

When usability is inherent in the products we use, it’s invisible. We don’t
think about it. But we know it’s there.

That’s because the products that have built-in usability suit us. We don’t
have to bend to the will of the product. It works the way we want it to
work. Perhaps we had to learn a few things, or more than a few, to get
going, but we don’t mind because the effort was small and the rewards
are great. Rewards like

• ease of learning
• ease of use
• intuitiveness
• fun (let’s not forget the importance of fun)
But what happens when usability is not inherent in the products we use? Here’s one example that many of us can relate to: We check into a hotel and need to set the alarm clock for an early morning meeting. But we don’t trust the alarm clock to work properly. Or we think we can do this simple thing, so we set the alarm, only to find out it doesn’t wake us up at the time we think we set it.

Did you know that one major hotel chain, Hilton hotels, decided to do something about this problem? It tested more than 150 alarm clocks on the market and didn’t find one that passed the “ease-of-use” test. So, Hilton designed its own alarm clock shown here. Other hotels are now doing the same thing.

Can you think of any products you’ve purchased that were just too complicated? Maybe you struggled to figure out how to make them work. Did you know that the average U.S. consumer will struggle for 20 minutes to try to make something work?

Things shouldn’t be that hard to learn to use. Time wasted trying to learn to use products means lost time for consumers and lost sales for companies when dissatisfied customers return products that don’t seem to work. But are these products always broken? A study by Accenture found that 95% of product returns actually worked perfectly.

Maybe you have experienced bad or inadequate product design, but you didn’t return the product for some reason. Maybe it was because you felt

For an interesting review of this alarm clock by Donald Norman, the author of The Design of Everyday Things and a usability specialist, see www.jnd.org/dn.mss/the_hilton_hotel_ala.html

Reported by Arar in PC World, June 2, 2008.
you didn’t have a choice or that nothing better was available. Does the remote control for any of your electronic devices come to mind?

Shouldn’t all products be designed with you in mind? Silly question. So what’s the answer to build usability into every product?

It’s you.

**U R usability**

If you are a software or web developer, engineer, interaction designer, information architect, technical communicator, visual or graphic designer, trainer, user-assistance specialist, instructional technologist, or anyone else who has a hand in the development or support of a product of any type, then you are the face of usability. Your passion for the user, advocacy for the user, and actions on behalf of the user can and do influence the usability of the product.

Despite your desire to support the needs of users, you may not yet be doing usability testing. Or, you may already be doing usability testing but would like to formalize or standardize your practice, perhaps even expand it. This book gives you the essentials to begin or add to your expertise. With a strong foundation in strategies for success and models to show you how, you will develop the core skills you need and add to those you already have.

**How to use this book**

The idea behind this book is to give you the tools and techniques you need to get going or to advance your knowledge of what you’re already doing. That’s why the book is called *Usability Testing Essentials*. The subtitle—*Ready, Set . . . Test!*—is meant to suggest that you should pick your starting point.

Begin wherever it makes sense to you. If you’re new to the field or perhaps a student, it probably makes the most sense to begin at the beginning of the book and read the chapters in the order in which they are presented. However, if you have some experience or have read about this topic before, you can jump in at the chapter or chapters that most interest you.
Maybe you need this book now because you’re getting ready to do your first usability test. Or maybe you’ve done some informal usability testing, but you’re looking for a methodology that you can apply to standardize your testing practices. In these cases, you might want to start with Chapter 5 on planning a test, or jump into Chapter 7 on conducting a test.

Here’s how the chapters are organized:

Chapter 1, *Establishing the essentials*, does just that. It gives you the essentials to define usability and usability testing so that you start with a vocabulary you can use. With a quick look back at traditional testing practices, the chapter moves you forward to what’s typically being done today in both small, formative studies and large, summative studies.

Chapter 2, *Testing here, there, everywhere*, looks at your testing options, including testing in a lab, testing without a lab, field testing, and remote testing—both moderated and unmoderated.

Chapter 3, *Big U and little u usability*, puts usability testing into the context of a user-centered design (UCD) process so that you have the big picture. In this chapter, you get a quick look at a toolkit of techniques you can use before and after usability testing to help your organization grow its understanding of the user experience. Special attention is given to heuristic evaluation because it’s often the most widely used tool in the UCD toolkit and is a frequent companion to usability testing. This chapter also gives you strategies to make the case for user-centered design by presenting some approaches for cost-justifying the use of these techniques.

Chapter 4, *Understanding users and their goals*, starts the preplanning process by focusing on users and their tasks. Of course, users are the linchpin for everything related to usability. This chapter starts off by reviewing the things we know about users in general. Then it looks at the things we know about web users in particular, especially the things we know about them because of their age or generation. Because it’s so important to get it right when it comes to your users, this chapter provides information on applying what you know about your users to create personas and scenarios.

The heart of the book is in *Chapters 5 through 7: Planning, Preparing, and Conducting a usability test*. In some cases, you may have the time to plan, then prepare, then test in three separate steps. In other cases,
you may have to compress the planning and preparing stages into one, with testing following right on the heels of preparation. Still, whether the timeframe is weeks or days, you will want to plan your test, then prepare for it, then conduct it. That's why there is a chapter for each of these stages.

What to do with all of those findings from a usability test? Chapter 8, *Analyzing the findings*, helps you make sense of what you have learned from users. Chapter 9, *Reporting the findings*, reviews the approaches—formal and informal—for sharing your findings with others.

*Chapter 10* delves into *International usability testing*. Interest in learning about users from other countries and cultures is increasing, along with a growing number of studies about users from different cultures. This chapter focuses on the unique aspects of international usability testing. Although it is the last chapter in the book, this placement is not meant to suggest that this topic is an afterthought. In fact, the main case study used throughout the book is a usability study of a Chinese hotel website, conducted in the United States, which shows that international usability testing can take place wherever you are.

**Special features you can use or skip**

Within the chapters, you will find some special features that you can use or skip, as suits your needs. These include:

- **References**—Although this book is well researched and well documented, it is designed to let you access the information you need without getting bogged down with references. The references are mentioned in margin notes, with full citations listed at the end of the book.

- **Margin notes**—I also use the margins to give you suggestions about relevant sources or to point you to another chapter for more information. If you're skipping around in the book, this may be particularly helpful to you.

- **Boxed sections**—These are either extended examples or sidebars of helpful hints or useful information. Case studies and extended examples are boxed in green and sidebars are boxed in purple. The colors will help you identify them so that you can use them or skip them.
A few words about words

Words can be slippery, especially when you’re using the vocabulary of a relatively new discipline. So, to be clear about the way in which I use some of the core words in this book, here’s what I mean for each:

- **Usability testing**—the process of learning about users from users by observing them using a product to accomplish specific goals of interest to them.
- **Usability test**—a single testing session.
- **Usability study**—the total number of testing sessions.
- **User**—the person who is the “customer” for the product; that is, the person for whom the product is designed. Also called the “target” or “end” user. In usability testing, we recruit the target user, who becomes a participant in the study. For some, the word user has become controversial in that there is some sensitivity surrounding its association with illicit drugs. Others prefer to refer to users as people or humans, as in the term human-centered design. I am sticking with users to mean the people we need to learn from so that we can build our knowledge about their experiences into the products we design for them.

*One word of caution: Avoid calling your users “test subjects.” This term is a holdover from the olden days of experimental design. Today, we are not working with test subjects; we are working with people who test our products for us so that we can understand their experiences. Some usability experts call them “testers” because they are testing a product.*

- **Participant**—refers to the testers, or users. When we refer to them as participants, we focus on their role in the study as the target users.
- **Product**—a catch-all term to refer to any element or component of the design that contributes directly or indirectly to the user’s experience. A product can be hardware, software, a web application, or a website. It can be an e-learning course, or a company’s intranet, or a computer game, or an interactive voice response (IVR) system. It can be a print document such as a manual, getting started guide, quick reference, or assembly instructions. It can be the packaging that starts the “out-of-box” experience. It can be the experience of calling customer support or engaging in a live chat session. In usability testing, the product is the “thing,” or process, that is being tested.
But wait, there’s more on the companion website

Because the growth of our profession expands almost faster than we can keep up, there certainly will be changes by the time this book is in your hands. You will find the latest developments and updates on the book’s companion website at www.mkp.com/testingessentials. It includes:

- Complete reports from the examples and case studies shown in the book, plus other reports
- Forms, checklists, templates, and so forth
- Resources for additional information

For instructors, you will find a special section containing:

- A sample syllabus and sample assignments
- An instructor’s guide
- Questions and topics for discussion
- Exercises for classroom or homework use
- Activities for developing a usability testing project