
User Session Field Guide

Facilitating a User Session



Framing the plan

- Agree on study goals
- Define target user group
- Determine which tasks need to be tested



Planning Principles

The test plan is the foundation for the entire test. It addresses the when, who, why, and what of your usability test.

Start writing the test plan as soon as you know you will be testing. Then, as the project proceeds, continue to refine it, get feedback, and buy in.



User Session Plan

Product

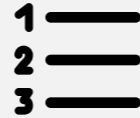
Title



Study Goals

Target User Group

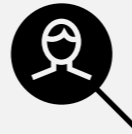
Task Plan



Study Goals

The study goals are the business objectives that underpin the study. These goals are the foundation of the plan, and they should be determined prior to the planning session.





Target Participants

Use any user data, personas, or hypothesis in conjunction with the screener worksheet to define who the study needs to learn from.

Try to focus each study on one group only.





Task Plan

The task plan should be a list of riskiest assumptions the team needs to validate in order to reach their goals.

These testable scenarios should be designed to identify specific behaviors or attitudes.



User Session Plan

TRAVEL SCHEDULING APPLICATION

Product

SCHEDULER

Title

1. VALIDATE NEW CONVERSION FUNNEL DESIGN

2. IDENTIFY PROBLEM AREAS

3. GAUGE USER AFFINITY TO THE NEW DESIGN

4. REFINE USER PERSONAS



'DOMINANT SCHEDULER' PERSONA GROUP

EXISTING USERS

AGE 25+

EQUAL DISTRIBUTION OF MALES AND FEMALES

ENOUGH INCOME TO TRAVEL

MANAGES MORE THAN 5 PEOPLE FOR AT LEAST 6 MONTHS

MUST BE AN AVID IOS USER

OPEN INTENDED EVENTS

FIND DIRECTIONS TO EVENTS

FIND NEW EVENTS

FIND FREE/BUSY

SHARE EVENT

FIND REFERENCE MATERIAL

RETURN TO GUIDEBOOK

Study Goals

Target User Group

Task Plan

Recruitment

- Create a screener
- Post screener where the right people will see it
- Select and schedule participants



Recruitment Principles

Spend plenty of time defining and selecting and select the participants you want. Be careful to screen out the applicants that won't provide you with helpful feedback.

While getting feedback from your friends and family can be better than nothing, studying real users is where the magic happens.





TARGET PARTICIPANTS

What *exact criteria* will identify the people you want to talk to?

What screening questions will you ask?
(Questions shouldn't reveal "right" answers.)



EXCLUDED PARTICIPANTS

What *exact criteria* will identify the people you want to talk to?

What screening questions will you ask?
(Questions shouldn't reveal "right" answers.)





Target Criteria

Use any user data, personas, or hypothesis in conjunction with the screener worksheet to define who the study needs to learn from. Try to limit each study to focus on one user group only.





TARGET PARTICIPANTS

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EQUAL GENDER DISTRIBUTION



WHAT IS YOUR GENDER?

USES IOS CALENDAR TO SCHEDULE MEETINGS



HOW DO YOU PLAN AND SCHEDULE MEETINGS OR EVENTS THAT YOU ATTEND?

USED AN IOS DEVICE IN THE PAST WEEK



WHAT MOBILE DEVICE DID YOU USE THE MOST IN THE PAST WEEK? (IF NONE ENTER N/A)

SOMEONE WITH EXPERIENCE IN A PROFESSIONALLY MANAGED CONTEXT



IF YOU'RE CURRENTLY WORKING, WHAT IS YOUR OCCUPATION AND EMPLOYER?



Excluded Criteria

Use any user data, personas, or hypothesis in conjunction with the screener worksheet to define who the study needs to learn from.

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Preparing the screener

Once the questions are crafted, prepare them in a way your participants can easily use.

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Application for Usability Study

(\$50 reward for 30 minute test)

Age*

Gender*

What device did you use to access the internet most in the last week?*

What are your main hobbies or side businesses, if any?*

How do you plan and schedule most of the meetings or events that you attend?*
If none enter N/A

If you're currently working, what is your occupation and employer?*
If none enter N/A



Posting the Screener

Make sure to post your screener somewhere your target participants will see it. Look for places with robust and targeted contact lists like professional associations.

If your audience is less focused, you can selectively recruit from a large sample generated using craigslist or mechanical turk.

[prohibited](#) ^[2] Posted: 18 days ago

★ \$50 for Usability Study on Thursday 8/13 (30 mins) (Downtown)

I'm seeking participants for 30-minute usability discussions this Thursday (August 13) in Downtown Austin. Anyone is eligible regardless of background.

Your reward for completing a session is a \$50 Amazon gift card.

Please complete this brief questionnaire:

<https://docs.google.com/forms/d/1bUL40YC3dAkSb33GwP061a89Dkih5AjlUyMDYmM2z6g/viewform>

We'll schedule appointments with eligible candidates on a 'first come, first served' basis until the study is full.

DETAILS

To participate you will need to:

Be willing to sign our usability Non-Disclosure agreement.

Allow us to record the session.

Not require assistive device or software to use a computer.

- Principals only. Recruiters, please don't contact this job poster.
- do NOT contact us with unsolicited services or offers

post id: 5159969007 posted: 18 days ago updated: 18 days ago [best of](#) ^[2]



Selecting Participants

If you used Google forms for your screener, then your results should already be in a spreadsheet. Use your screener and user data to prioritize and select participants.

25	F	0	design, fashion	computer iphone	n/a	art	iphone
48	Male	0	internet marketing	laptop	N/A	N/A	Apple iPhone
27	Male	0	Writing/playing music, reading, film,	I phone 5	Uber/Lyft, and Rover	N/A	Apple
47	male	0	A.S.P.C.A.	desktop	prep cook	N/A	motorola
45	Male	0	Pottery	Desktop	Teacher	Na	IPHONE
60	Female	0	cooking	library computer	Administrative Assistant at UT	n/a	tracfone
31	Male	0	working out	mobile phone	Uber Driver	N/A	Samsung S6
42	F	0	Selling in eBay	iPad	Accountant /whole foods market	N/A	iPhone
53	male	1	flying, diving, gaming	NEXUS 6	self-employed speculator	N/A	MOTOROLA NEXUS 6
19	Female	1	Spending time with my family	iPhone	Interactions	Na	iPhone
36	Female	1	reading, cooking, exercising	Phone	Counselor, Bluebonnet Trails	N/A	Iphone
56	female	2	writing, reading	Mac laptop	retired writer/editor	N/A	iphone
19	Male	2	Playing Music	Phone	Tiff's Treats	Communications	iPhone
30	Male	2	Reading, strategy games	Phone	N/A	N/A	LG
42	Female	2	Games, reading	desktop computer	State Government TX Comptroller's Office	N/A	Samsung
29	Male	2	Gaming	Computer	Network Engineer / TWC	N/A	Samsung
28	male	2	selling, helping othera	laptop/ computer	career advisor	N/A	LG android
58	female	2	making jewelry, movies, helping homeless	desktop computer	n/a	n/a	spirit
53	male	3	musical	cell phone	N/A	N/A	Samsung
30	Male	3	Sports, talking and playing	Computer	Sports Broadcaster	n/a	HTC
27	Male	3	fitness trainer	Laptop	managing partner; Conquest Media Group	N/A	Samsung Galaxy S4
43	female	3	hiking, reading	laptop	sales/harmless harvest	biology	nokia
35	male	3	gaming	computer	N/A	N/A	T- mobile
34	Male	3	Basketball	Monday	Market source	Na	Tmobile
41	Female	3	Shopping	iPhone	Stratus	MBA	AT&T iPhone 6
33	f	3	listening to music, environmental/ sustainability talks, yoga.	laptop	na	na	htc
53	male	3	auto mechanics	home computer	mobile mechanic	N/A	samsung
26	Female	3	Music, sewing, media	Laptop	server	n/a	Samsung
53	female	4	gardening	phone	n/a	no	iphone
33	Male	4	Fitness	Cell Phone	Sales - KPI Analytics	N/A	Alcatel
27	Male	4	Languages	Computer	N/A	N/A	Samsung
49	male	4	computers and golf	phone and computer	IT/Asst Comm Mgr - YellowCab	n/a	iphone 6+
34	female	4	acting	phone	grocery shopper for mobile app	N/A	iPhone



Scheduling Participants

We like to schedule tests in blocks with 15 minutes in between for discussion. You may have to call a few people for each one that you successfully schedule.

Once you have someone on the phone, try to informally gauge their interest and likelihood of showing up to the user session.

Hey this is (name). I am calling because you were selected to to participate in a user study that you signed up for on the Craigslist job board.

Is this still something you are still interested in?

To get started we just need to get your name and email to send a follow up with the NDA.



Following up

Let them know time/place, settle logistics and remind them of the reward. This is also a great time to let them know about parking.

Hey,

This is Dan from Jackrabbit Mobile writing to thank you for your participation in our usability test tomorrow!

We will see you at 11:50am on Wednesday at 701 Brazos Street. Come up to the 5th Floor (Capital Factory) and ask the receptionist for Jackrabbit Mobile.

We just ask that you respond to this email confirming your attendance.

Warm Regards,
Dan

PS: We also attached a copy of our Non Disclosure Agreement for your reference. Feel free to print this out and sign it or we will have copies to sign tomorrow before the session.



Preparing to Interview

- Create interview guide
- Review task guide
- Set up test devices and recording system



Creating an Interview Guide

Start with a general script focused on putting the participant at ease. Try to facilitate the sharing of the participants candid feelings.

Intro:
(informal chit chat / build rapport)

Moderator (with a big smile!):

Thanks for coming in today! We're constantly trying to improve our product, and getting your frank feedback is a really important part of that. Before we start, I need to ask you to sign this non-disclosure agreement. I like to highlight two parts of this. First, it's a reminder that what I show you and what we discuss here today are confidential. It also gets your permission for me to record our session—just for our own internal use. That way we can go back and review it later. And, of course, you're free to take a break or leave at any time during the session. Please take your time reviewing this NDA and let me know if you have any questions. [Hand NDA to participant with pen to sign.] Thanks!

[Moderator: After NDA is signed, start recording.]

I like to keep these sessions pretty informal. I'm just trying to learn from you today. I'll ask a lot of questions, but I'm not testing you. There are no right or wrong answers.

Since I didn't design any of this, you won't hurt my feelings or flatter me. In fact, frank, candid feedback is the most helpful.

Again, I'm not testing you. If you get stuck or confused, it's not your fault. It helps us identify the problems that we need to fix.

If and when you do get stuck, I'm going to try not to answer your questions or tell you what to do. I'm just trying to see what you would do if you were using it on your own. But don't worry—I'll help you if you get completely stuck.

Do you have any questions before we begin?



Review Task Plan

OPEN INTENDED EVENTS

FIND DIRECTIONS TO
EVENTS

FIND NEW EVENTS

FIND FREE/BUSY

SHARE EVENT

FIND REFERENCE MATERIAL

RETURN TO GUIDEBOOK

Review your goals and the tasks that you are exploring in the user session. If you are using a prototype, go over it and make sure that it doesn't need any last minute changes.



Set up test environment



Make sure to afford plenty of time to setting up the test space. Record video of both the prototype and the participants faces in order to get insight into both attitudinal and behavioral dimensions.

It is also best practice to run a pilot test where the experiment itself is validated. This pilot can be with a coworker and shouldn't be included with the other results.



Interviewing

- Interview people!



Principles:

Capture people's actions and words

Interpret Later

If you get lost ask participant to 'tell you more' or 'explain that to me'



Do:

Write down what people say and do

Take photos

Engage (smile and react nonverbally)

Ask open ended questions

Ask for examples



Don't:

Engage in conversation

Write down solutions or implementations

'Pitch' your ideas to participants

Ask participants to predict the future



If anything is unclear:

Can you tell me about what you just did?

Could you explain that to me?



Follow with Analysis

