

# Planning for Usability Testing

When I take clients through the process of usability testing, they have some typical questions at the beginning of the process. How does usability testing work? How do we make sure everything is set up properly? How do we recruit users?

Here's an overview of what to expect as you go through the process of preparing for usability testing.

## 1. Set Your Goals

Each usability test is different and has different goals. You might want to test the site map and navigation. You might want to know if a prototype performs well. Maybe you want to know if the content you've re-written is easy to read. Once you set the appropriate goals, you can choose the scenarios and tasks that help meet that goal.

## 2. Create a Test Plan

A test plan details everything that will happen in the usability testing. Laying this all out in a plan ensures consistency in each test and lets the test facilitators be prepared. You'll plan for things like:

- How you will recruit users
- The questions you'll ask during the test
- The script you'll use to introduce the test to the participant
- The hardware, software, and logistical arrangements

Having this test plan is helpful in another way: if your main facilitator can't make it (maybe they are sick) you can still ensure consistency in the way the test is facilitated.

## 3. Create a Screener

Participants can't be random people off the street and they can't be employees (unless you're testing an Intranet). Because your users have certain demographics, your participants need to conform to these demographics. It ensures the feedback you get from your participants is reflective of your users.



## 4. Pick a Time and Date

If you're doing the testing in person, you'll need to pick specific times and dates. If you're doing usability testing online, then you'll need to pick a date range for the testing.

## 5. Book the Meeting Room

If you're doing in-person usability testing, you'll need a place to host the testing. Whether it's in your office or in a rented space, ensure the room has a chair for the facilitator, participant, and note taker. You'll also need a well-placed power outlet or an extension cord. (This assumes you're doing your usability testing in a space other than a usability testing lab!)

## 6. Coach Coworkers

If any coworkers are sitting in on the test (other than the note taker), these coworkers are silent observers! No comments from the peanut gallery.

## 7. Recruit Participants

Start sending emails and making those phone calls. Any email text or phone script should be outlined in the test plan. You can directly recruit friends, family, acquaintances, use connections, or use a recruiter. Just make sure that your participants meet the demographics outlined in the test plan!

## 8. Run the Test

The day of the test execute your test plan! Make sure you've:

- Got your incentive
- Taken care of all the logistics
- Set up any necessary hardware or software
- Provided any refreshments

## More Resources

There's a lot of information out there about usability testing. You can learn more with these links:

[Employees as Usability-Test Participants](#) (from Nielsen Norman)

[Recruiting User Research Participants by Email](#) (UX Matters)

[The ROI of Usability Testing](#) (UPA)

[Team Members Behaving Badly During Usability Testing](#) (from Nielsen Norman)

