Moderating Usability Tests: 10 Golden Rules

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Overview

- Where the rules came from
- The 10 Golden Rules
- Video illustrating good and poor practices
- Discussion of videos
- Questions

Summary of the Rules

1. Decide how to interact based on the purpose of the test
2. Protect participants' rights
3. Remember your responsibility to future users
4. Respect participants as experts, but remain in charge
5. Be professional, which includes being genuine
6. Let the participants speak!
7. Remember that your intuition can hurt and help you
8. Be unbiased
9. Don't give away information inadvertently
10. Watch yourself to keep sharp

The "art" of interacting

- There is no research on good and bad interaction practices

- Almost everyone learns as an apprentice, with little feedback after the first 2-3 sessions

- We have experience, but don't believe that there is one "right" way to interact

Your roles as a moderator

- ## The Gracious Host
  - ☐ Greet the participant warmly
  - ☐ Accommodate them in every way possible

- ## The Leader
  - ☐ Control the pacing of the session
  - ☐ Take charge

- ## The Neutral Observer
  - ☐ Let the participants speak
  - ☐ Be unbiased

How much to interact

- Every administrator has a style of interacting – no research on whether <u>amount</u> of interaction matters
- You always intervene when you think the participant does not understand the task
- Points to consider:
    - ☐ When you talk, you influence the test results in some way
    - ☐ Probes/questions should further the goals of the test
    - ☐ Are you evaluating the product through the participant?
    - ☐ Are you speaking to developers through the participant?

Decide how to interact based on the purpose of the test

- **The type of test**
  - ☐ You can be more interactive in a diagnostic test
  - ☐ Competitive or benchmark testing requires minimal interaction

- **The stage of product development**
  - ☐ In earlier stages there is more probing and exploration
  - ☐ In later stages, you may want to gather data to validate the design

- **Your relationship with the team**
  - ☐ If there is mutual trust, you are freer to explore and be less concerned with measures of failure
  - ☐ If there is resistance from developers, you may have to let participants continually fail and struggle

Rule 1

Protect participants' rights

- Follow ethical guidelines for research with human participants
- The order of protection in data collection should be the participant first, the organization second, and data integrity third
- Ensure their safety and comfort (physical & emotional)
- Obtain informed consent
- Never pressure or coerce them
- Provide reasonable compensation for their time

Rule 2

Remember your responsibility to future users

- One of your goals is make the product easier to use for all those who will use it *in the future*

- You are as much an objective observer as friendly facilitator

- Sometimes the test participants need to struggle and be frustrated to provide the data to motivate change

- You compensate them and you can support them, especially after the session

- It may help to invite them to take on this role of helping future uses

Rule 3

Dealing with failure

- **This is often the most difficult aspect of interacting**
- **Failure is part of the process of motivating product changes**
- **Your preventative actions in your instructions can help, but don't eliminate this problem**
  - This is when they make statements to defend themselves
- **Steps to minimize the impact of failure:**
  - Make eye contact if you can
  - Remind them that they can't make a mistake
  - After the third (?) task, tell them how well they are doing
  - Be matter of fact, not emotional
  - Watch for signs of extreme frustration or shame – silence, tears, anger, repetitive behaviors
  - Take a break

Respect participants as experts but remain in charge

- **Participants know their jobs and tasks**
  - ☐ They are usually skilled professionals
- **But they expect you to know what you are doing**
  - ☐ You need to take charge of logistics and pacing
  - ☐ Maintain a calm, professional, matter-of-fact demeanor
  - ☐ Stay focused, not distracted
  - ☐ If you are unsure of what to do, take a break
    - Talk with developers about what to do next
    - Or have the participant leave the room while you work on a problem
    - Or use wireless communication with the developers

Rule 4

Be professional, which includes being genuine

- Creating and maintaining a connection with participants is critical to their comfort and obtaining valid data
- Do's for making a connection
  - Greet them warmly
  - Look them in the eyes
  - Smile
  - Hold a relaxed posture
  - Listen attentively
  - Use acknowledgement tokens periodically
  - Use their name periodically
  - Use a modulated (even, calm) tone of voice
  - Adapt to the participant's interaction style

Rule 5

Let the participant speak!

- **Minimize interruptions**
  - ☐ Participants should talk 80% of the time
  - ☐ When in doubt, wait before saying anything

- **Use acknowledgement tokens – "mm hmm"**
  - ☐ They allow the participant to stay in control of the communication. This is called "speakership."

- **Saying nothing is still communicating**

Rule 6

Your intuition can help and hurt you

- With time and practice, your intuition will tell you what to do and it will tell you when you violate a rule – listen to it

- You have to learn to resist the natural tendency to make the participant feel better about failure

- You need to recognize when you are projecting your own emotions onto the participant

Rule 7

Be unbiased

- Watch out for adjectives and adverbs – "easy", "hard", "helpful"
- Describe both sides of an issue – like or not like, difficult or easy
- Turn questions around "Did you think that was the way to do that task?"
- Give the same feedback for negative and positive comments about the product
- You don't have to answer every question
- If you ask a question such as "How confident are you that you completed that task?" do it for every task
- In a summative test, minimize prompts

Rule 8

Don't give away information inadvertently

- When giving an assist, consider whether what you say will affect a future task

- Avoid explaining the designer's intent or being defensive

- Record all suggestions without giving away product plans

Rule 9

Levels of assistance – all assists are not equal

- **First, give as little assistance as possible (prompting)**
  - ☐ "So what's happening?"
  - ☐ "Could you read the task again?"
- **A little help**
  - ☐ "Remember how you started this task? You were getting close"
  - ☐ "You actually went by the option you need"
- **Give them only the next step**
  - ☐ "Try looking in the File menu"
- **Show them how to complete the task?**

Watch yourself to keep sharp

- We all develop bad habits – it's not a failure
- We all hate to watch ourselves – it's human nature
- It helps to practice with a friend – give mutual feedback
- Look for annoying gestures, repeating words, facial expressions
- Offer to help your colleagues

Rule 10

Videotape

Discussion

Conclusions

- The test experience should be positive for the participant, but some people will blame themselves no matter what you do

- Interacting with participants requires you to balance competing goals

- There is not such thing as a "perfect" test session

- "Allow yourself to do one 'stupid' thing every day" – Mary Beth Rettger

- These rules provide a foundation, but every session is different – remain flexible and alert

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