

An underwater scene with a large, light blue circular area in the center, surrounded by dark blue coral and seaweed. Small white bubbles and fish are scattered throughout the scene.

A fun dive into

Usability Testing

With 🧡 Zeta Design Team

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Usability Testing is essentially
blind-spot discovery.

That's where there are
so many "Aha"
moments. :)



ZetaUX



This book belongs to everyone who is never
satisfied in shallow waters and loves diving deeper.

It's for dreamers who can never quench their thirst.
We hope you never cease your curious mind from
searching mysteries in the sea of knowledge.

Chapter 1:

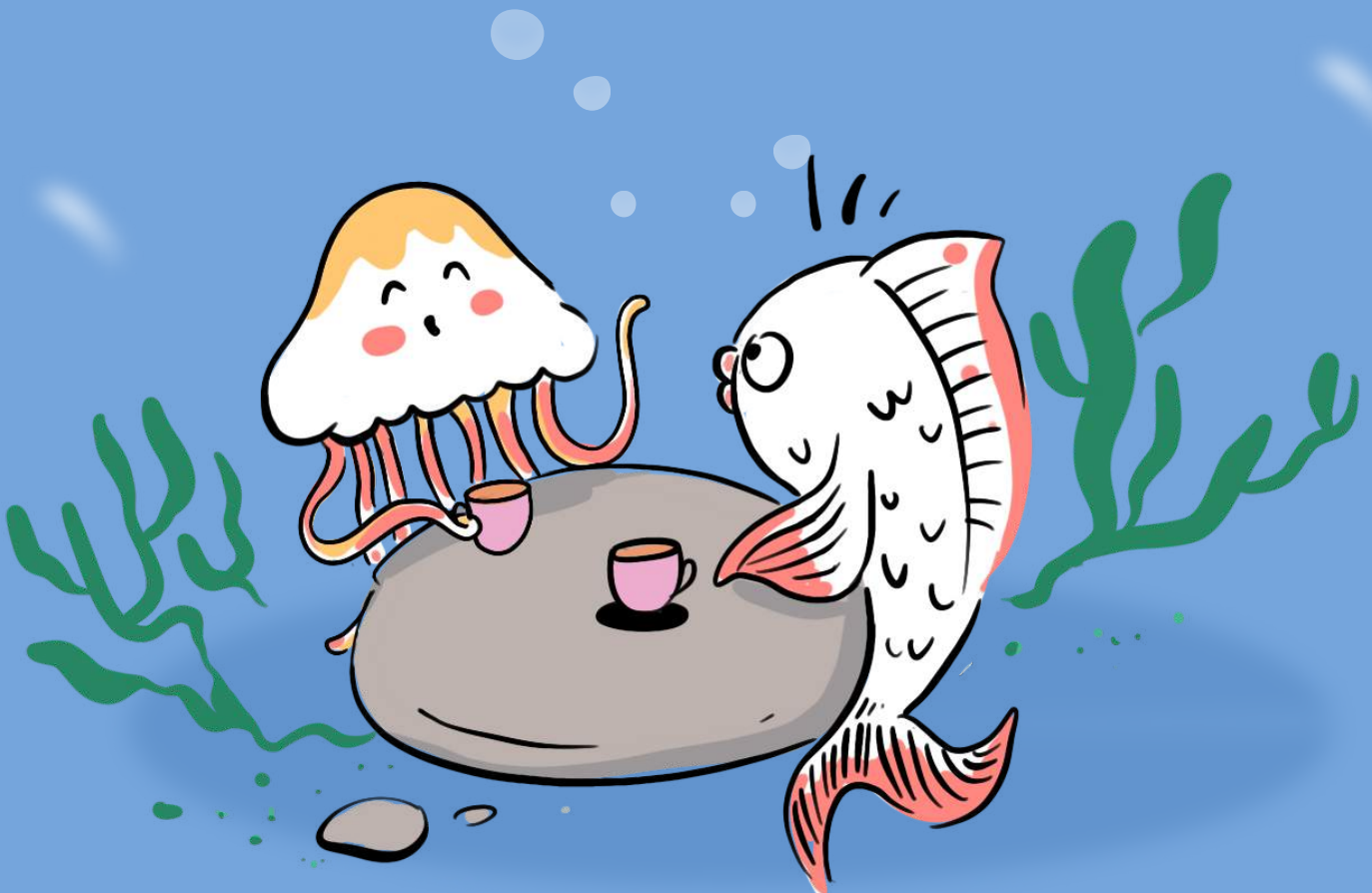
TESTING THE WATERS

Sushi: My product is going to go live! I hope everyone will love it.

Jelly: Of course they would! You must already know it since you did usability testing.

Sushi: I did not know how to do it, so I.... skipped it

Jelly: I won't blame you. It's easy to feel lost at sea. Let's start by knowing what usability testing is.



What Is Usability Testing?

Usability testing helps you evaluate your product by testing it among a target audience. It's like getting front seat access to see people use products you created for them.

Usability testing involves 3 people:



Facilitator



Observer



User

Putting The Use In Usability Testing

Conducting UT has many benefits. Usability testing helps you weed out all problems in your app or website, saving time and cost.

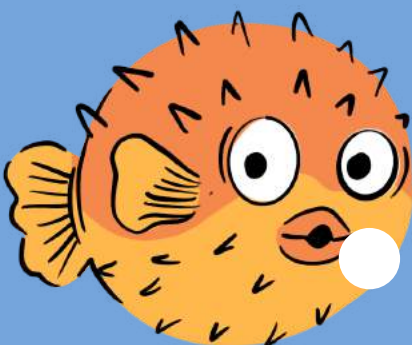
Follow the bubbles to know why you should do usability testing.

To evaluate the good, the bad and the ugly

An opportunity to see live reactions while using your product

To understand if your product is solving their problem

A chance to talk to your target audience



Chapter 2:

SAIL ON CAPTAIN!

After knowing what usability testing meant, Sushi and Jelly were confused on how to measure what's good and bad...right then they saw something big!!

Octi: Yo kids I'm here working on Key Performance Indicators aka KPI!

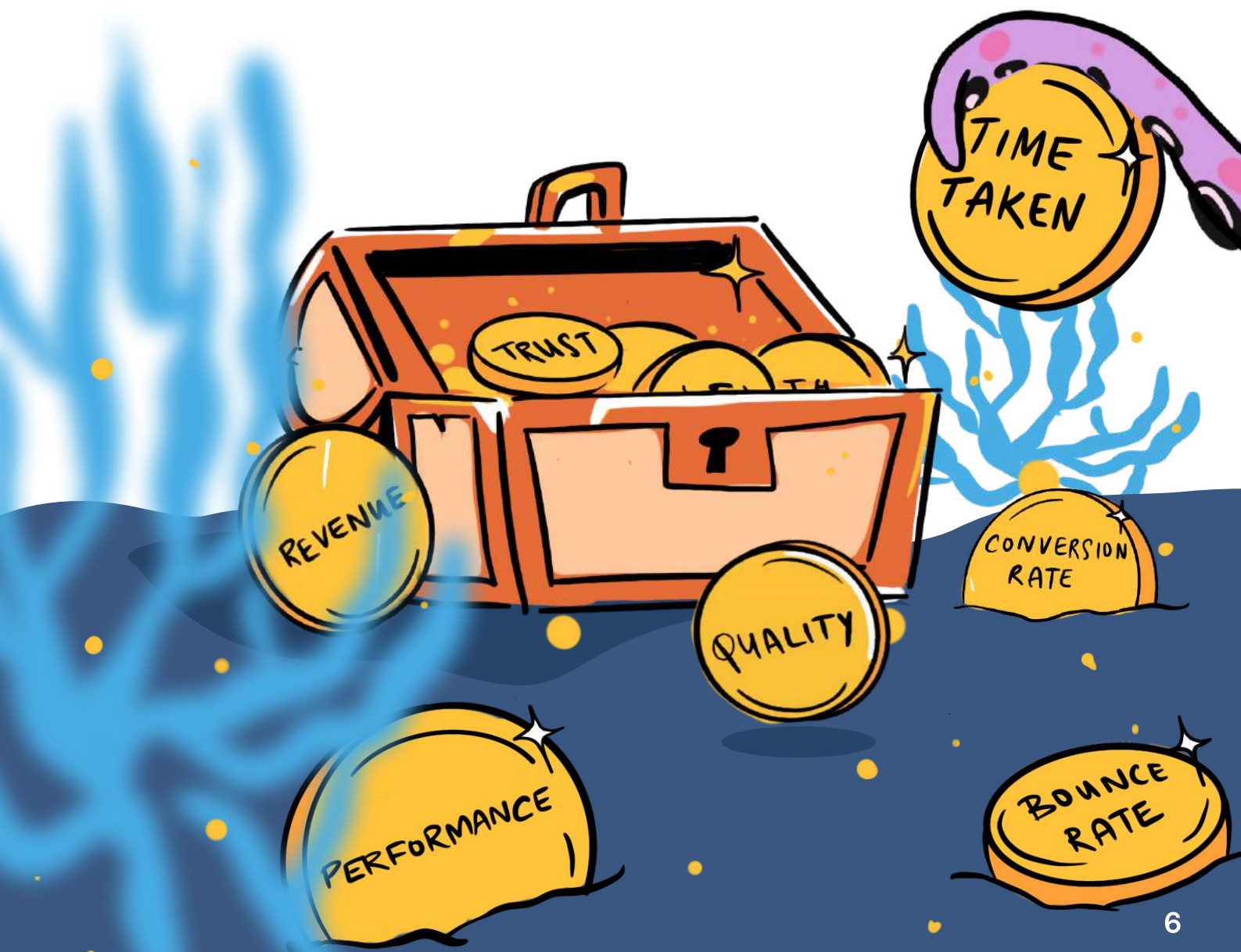
Sushi: What's KPI?

Octi: I can't wait to tell you, come on sail with me!



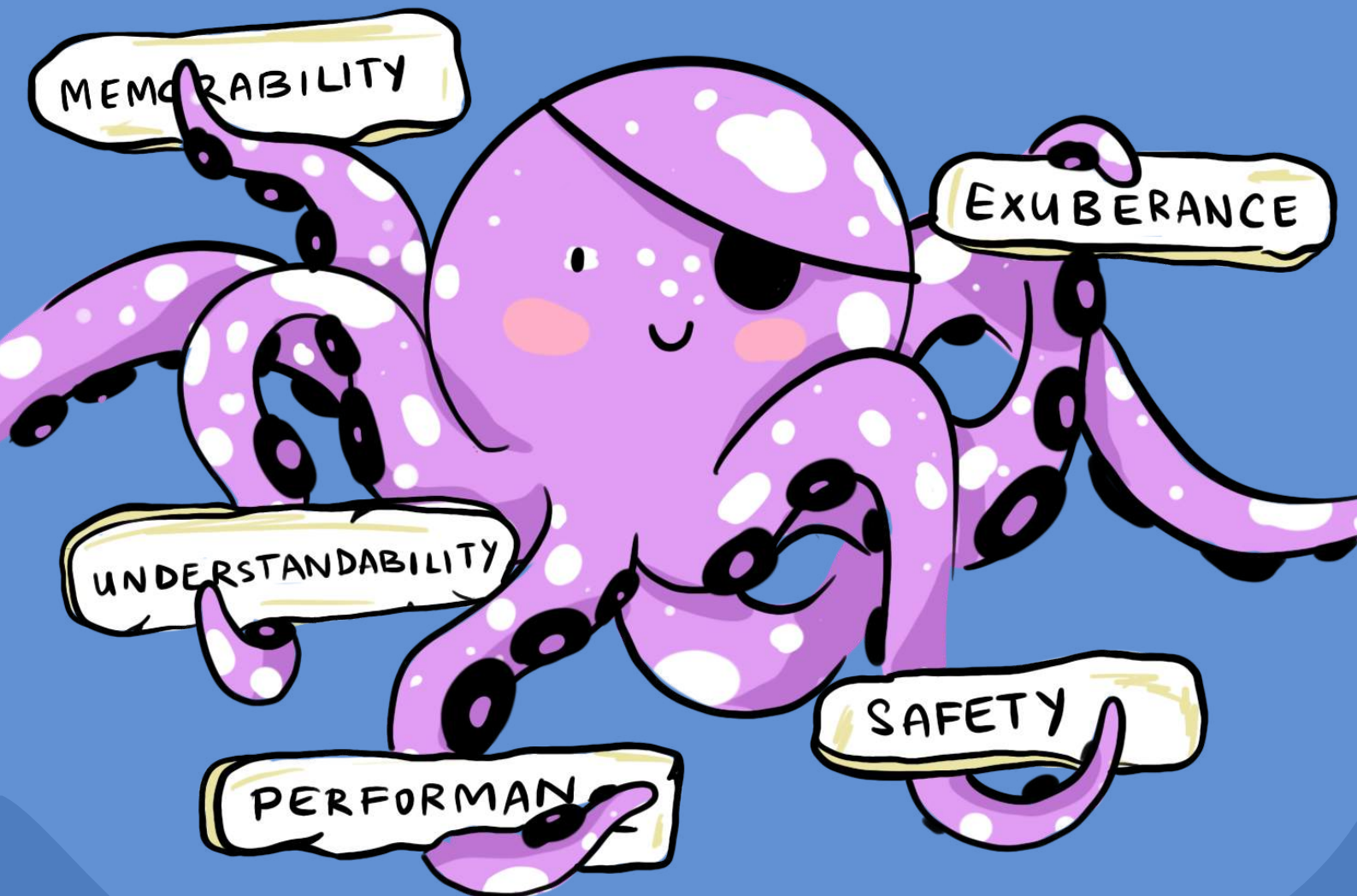
Pirates Of The KPI

When you're building a product, it's easy to get lost and hence Key Performance Indicators (KPI) act as your map. To have a smooth journey with no bumps and surprises, you set up KPIs even before you begin with design. Key Performance Indicators help you quantify what success looks and feels like for your app or website.



KPI and Usability Testing

Every product has its own set of KPIs. Observe my tentacles!
You can see the most common Key Performance Indicators
that were personally tested to get you started.



1. Understandability

How easy it is for your user to understand the content, flow and visual elements to make a decision.

2. Performance

How well is the product working, if there are any bugs or failures, and how well your product serves it's function.

3. Memorability

How easy is it for users to complete the task based on past interactions of similar products. You can also analyse if they had any confusion with certain patterns in your product.

4. Exuberance (Delighters)

Is the design experience you created is delightful, fun, whimsy and easy to use.

5. Safety/Trust

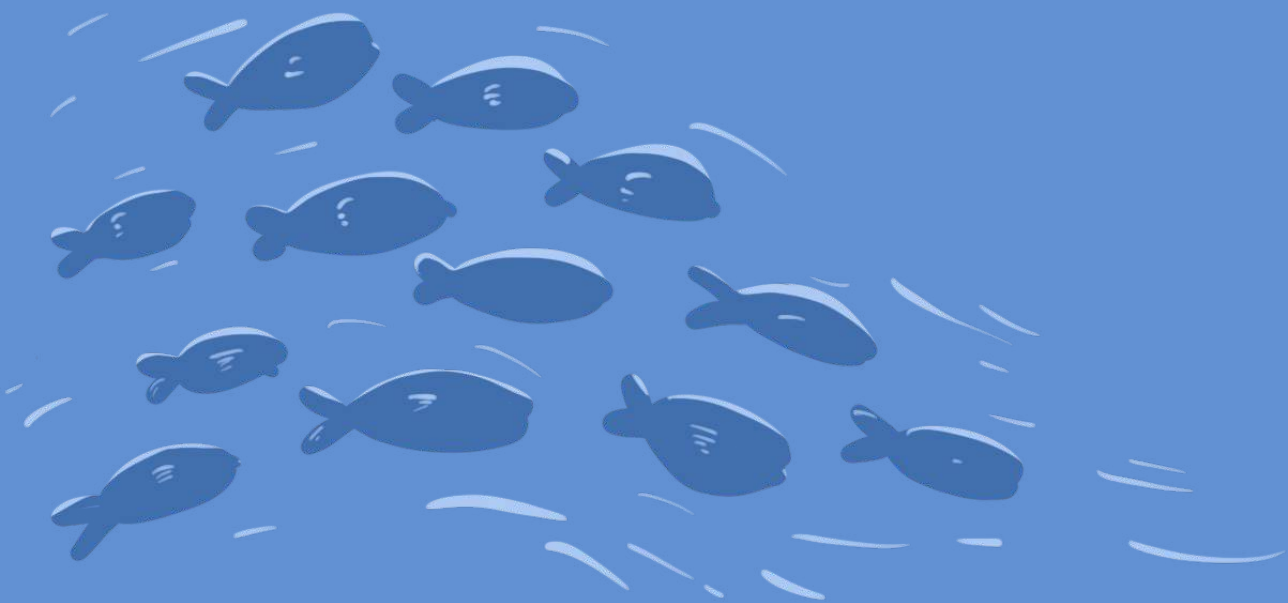
How safe your users feel when they provide their information. If they doubt the credibility of the product, analyse the reason.



Each Product Can Set Their Own KPIs

Each product has their own set of KPIs based on what success means to them and how do they cater user's expectation. E.g. For an e-commerce app, being delightful and easy to use could be an important KPI.

But on the other hand, if you look at Products like Slack, which is a messaging app for business that connects people to the information they need, delighters and exuberance may not be a significant KPI for them. So, you can set up KPIs for your product yourself.



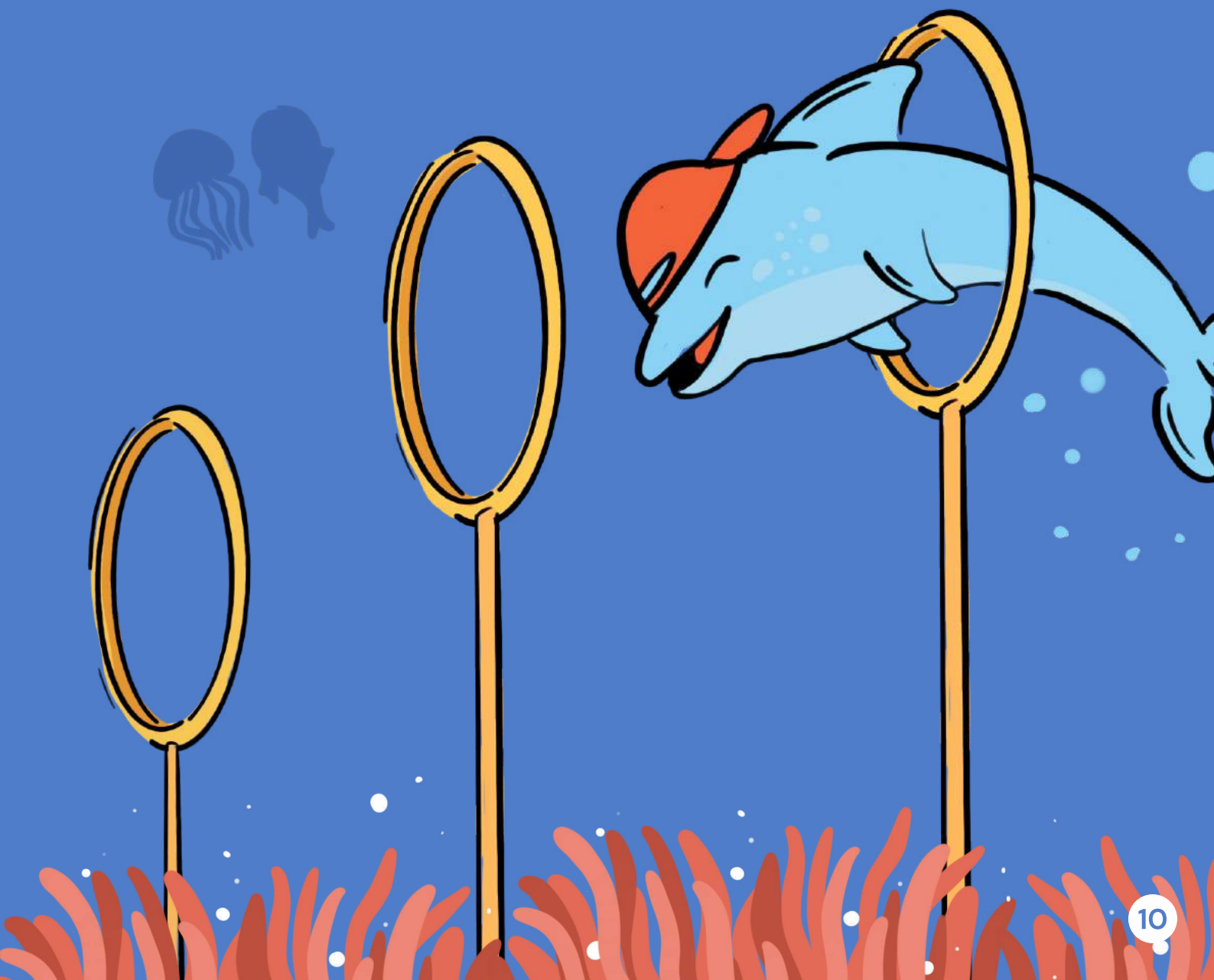
Chapter 3:

DOLPHIN'S TALE

Sushi and Jelly jumping with joy after learning about KPIs as they swam a little deeper.

Just when they thought they've seen it all, they saw Dolly the dolphin creating master strokes!

But what is Dolly doing here? Let's find out.



Before You Begin Usability Testing:

01

Define your KPI

Each product have their unique key performance indicators. Before you start the usability test, set metrics that will help you measure the success of your product.



02

Write the UT script

To prepare for the main act, you must create a script. Creating a usability test script will help you stay in control and not let the waves wash you off. These are the few sections you need to prepare while writing your script.

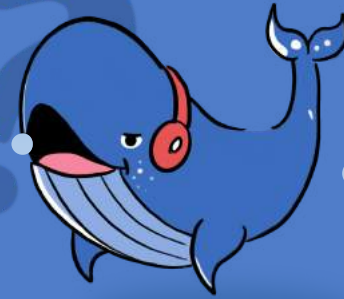
Friendly introduction:

The facilitator controls the entire test. If you're a facilitator, you start the interview by introducing yourself and your fellow mate, the observer.

Create dialogues that will help you be open about the process, the steps, expectations and how their input will help the product. Make them feel like their small contribution will create a big impact. Lastly, make sure you ask for their consent before recording the session.

PRO TIP

Your users involved in the test might be anxious before they begin the interview. A friendly introduction and asking more about them will make them relaxed.



Questions on demographics

Just like jumping into deep water ruffles you, it's important to maintain the amazing dynamics you created with your user.

Begin with comfortable questions such as their age, marital status, where they live, profession and many more. Make sure you focus these questions on the user and not on you or the product.

While explaining the process, asking questions related to their patterns can be helpful. Let's say you're testing out your e-commerce app, finding how much do they rely on fashion e-commerce for their clothes and apparels could be a good question to recognize user behaviour better.

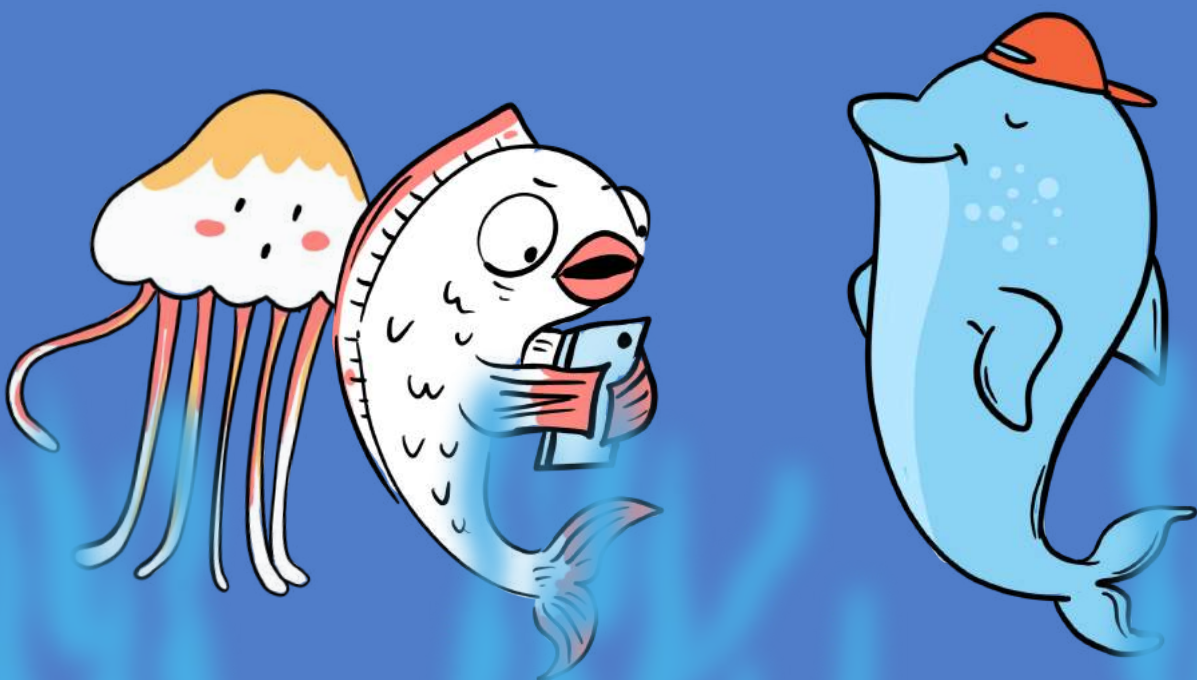
The benefit of asking such questions is that it helps the user become more comfortable with you. When they answer the questions that are very obvious (Since they are related to their existing behaviour) they become confident and open up during the session, which makes it easy to gain useful insights.

Define the task/tasks

Set out your task and the questions you need answers for during the testing. For example – If you want to test out your new feature on your e-commerce website where users can change the colours of their clothes, your task details will look something like this:

Task: Assume that you are going through the men's category and like a shirt; try to purchase the shirt in different colour options and buy it using UPI.

The next step will be to write questions that will help you probe more about the task but not influence the user's decision or feedback.



03

Source candidates

Your candidate should match your user persona to ensure that you get feedback from people who will use your product in the future. Some things to consider before you source your candidates are:

- Match candidates that have the same demographic factors (age, marital status, country of origin) as your user persona.
- The candidate should be a potential user of the product that you're building.
- Schedule an interview based on the availability of your candidate for user testing.

PRO TIP

Try to source candidates who're enthusiastic to try out the feature/product. They'll be able to provide you insights in detail.

04

Test Test!

Before you begin with the real session, you need to know where you might fumble. Have a test session with your colleagues to know:

- The total time taken to complete user testing.
- See if the tasks that you have defined helps you collect the required insights or not.
- Make sure your product works perfectly with no technical glitches.

PRO TIP

If at this moment, you feel that changing the task might help you in getting better insights, you should go ahead and make that change.

05

This is not a drill

Now it's time to do real usability testing with your candidates! Be it offline or online, being confident in your product and observing users is a wonderful trick to find the hidden gems you're looking for.

Here are some useful tips to end the show with a bang.

- Note down the pain points of users during the testing. The questions they asked or the places they stumbled.
- Appreciate them for taking the time to show up and how their input was valuable.
- Share a form with them to get their feedback. This will also give them time to think more deeply about the product and their experience.

PRO TIP

Approach to a Virtual Usability Testing and In-person Usability Testing could be slightly different. Refer to the last chapter to read about both techniques.

Chapter 4:

SPOTLIGHT ON ANALYSIS



Light up the parts that matter!

When you finish usability testing, you usually have a lot of raw data you need to sort out to reach your goals or Key performance indicators (KPI).

In this chapter, you'll learn different ways in which you can collate and analyse data.

Disclaimer: These are some of the best practices to analyse your data, you can choose to use all/few of them depending upon your research.



01

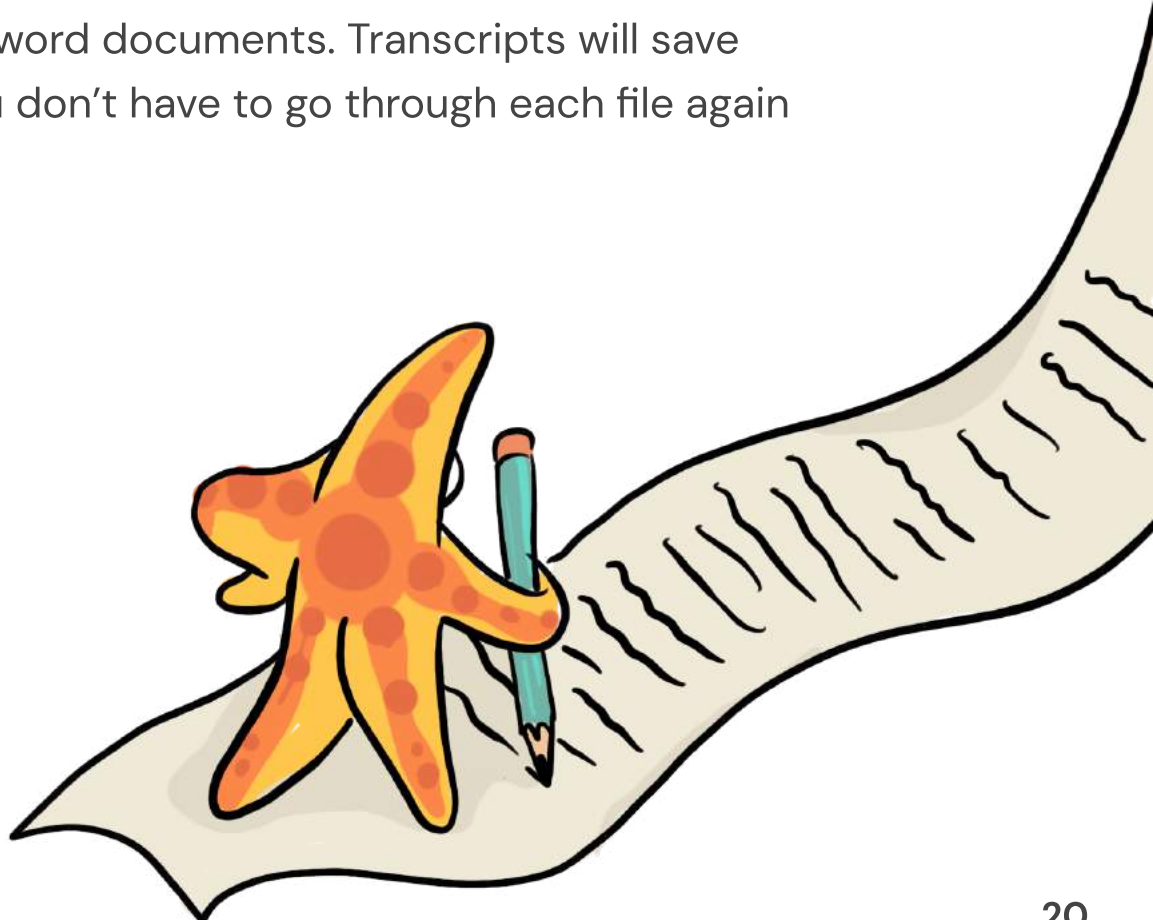
Collect the useful bits

Taking the Notes

During the session, make a rough note of the points. You just need to highlight important words which you can add sense to after the testing is complete.

Transcribing the session

Make interview notes by turning all audio and video interviews into word documents. Transcripts will save you time as you don't have to go through each file again and again.



02

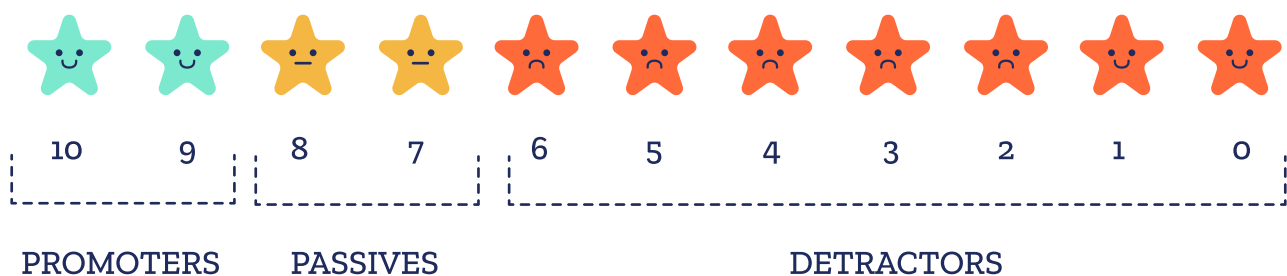
Time to analyse everything

Calculate Net Promoter Score.

NPS is measuring how excited your candidates are while using your product and how likely they are going to recommend it to everyone else.

$$\text{NET PROMOTER SCORE} = \begin{array}{c} \text{★} \\ \% \end{array} - \begin{array}{c} \text{★} \\ \% \end{array}$$

PROMOTERS DETRACTORS



Create a common pattern for quantitative data.

E.g.: 85% of the participants loved the product and will use it again.

These data points could be based on emotions and how users feel about the experience.



Calculate the total time taken to complete the task.

When your user finishes the task way ahead of what you expected, it usually means your product was easy to use and if they take longer, it just means you need little fixes.

Calculate System Usability Scale.

The SUS provides a quick and reliable tool for measuring the usability of a product. It comprises of a 10 item of a 10 item questionnaire with five response options for respondents; from strongly agree to strongly disagree.

With SUS, you measure how usable your product is. Don't worry, we have a template for you, so you don't get confused about how to do it.

Template for SUS and its formula is mentioned in the last chapter i.e. Chapter 8 – Free resources.

1. I think that I would like to use this system frequently.

☐ ☐ ☐ ☐ ☐

Strongly Agree

Strongly Disagree

2. I found the system unnecessarily complex.

☐ ☐ ☐ ☐ ☐

Strongly Agree

Strongly Disagree

3. I thought the system was easy to use.

☐ ☐ ☐ ☐ ☐

Strongly Agree

Strongly Disagree

What We're Trying To Say Is:

When you analyse all the gems you got, you find what matters the most which will turn into what your product really needs. Skipping this step would mean manually going through endless recordings and using your own rationale to make everything better.



Chapter 5:

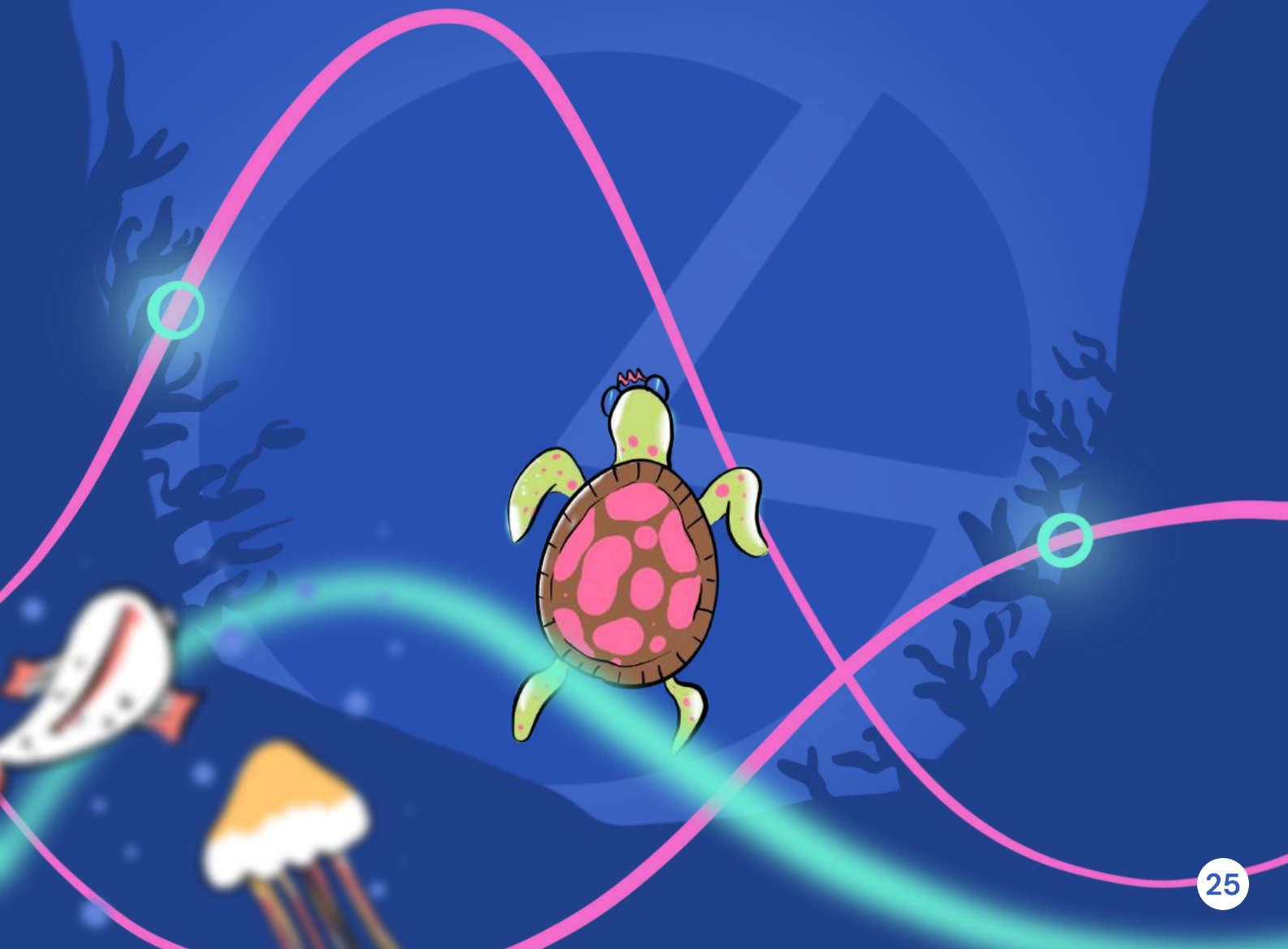
LIFE OF PIE

(AND GRAPHS)

Sushi: Is that Mr.T!!! The famous Pie master!!!

Jelly: You guessed it right, he's here to help us show all the data we've collected.

Sushi: I'm so excited!!



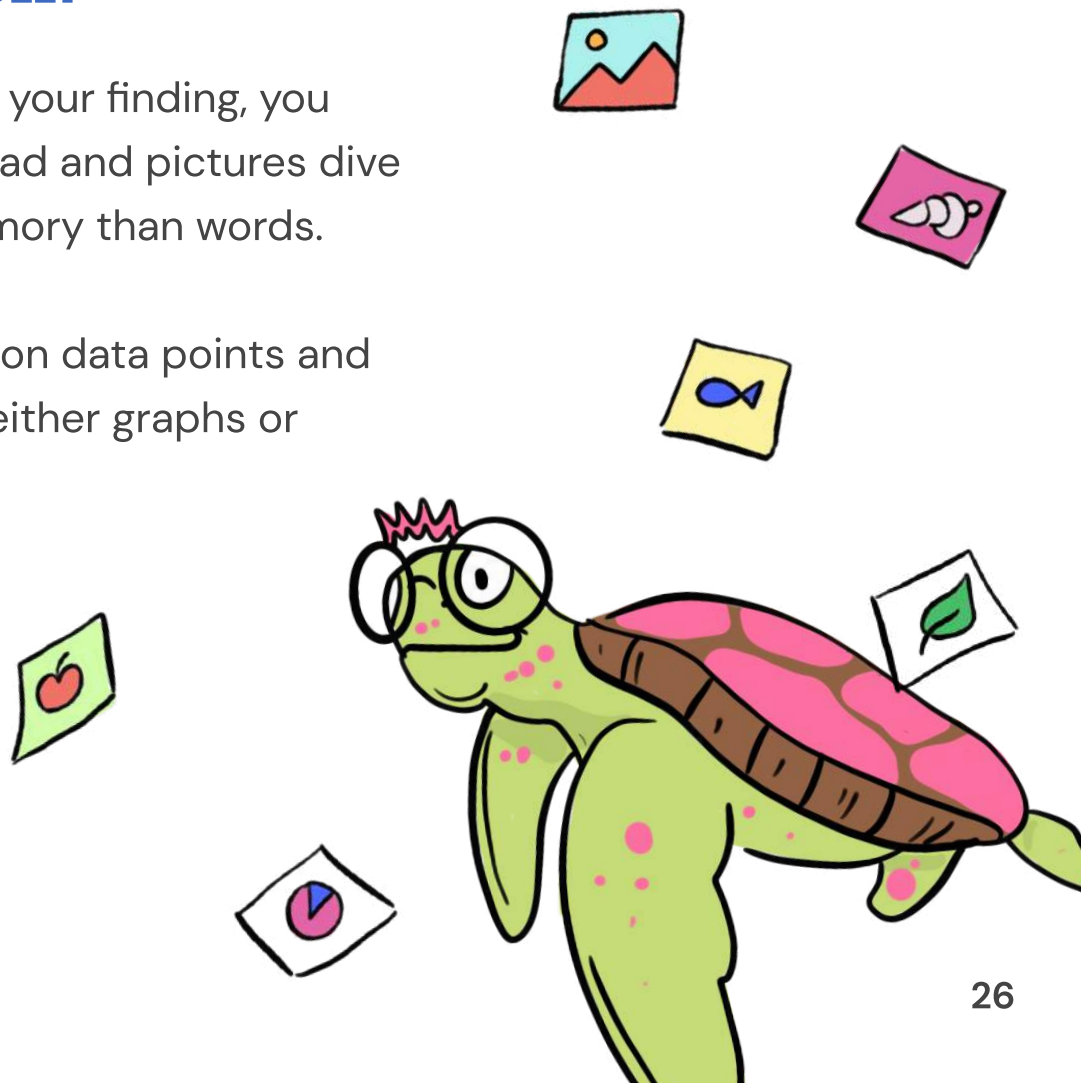
Jazz it up!

With all the hard work you've done till now, your data should be as exciting as you are. That's why it's important to represent it the right way. Here are some useful ways that'll actually make some waves.

Show to tell:

When you visualise your finding, you make it easier to read and pictures dive deeper in your memory than words.

You can find common data points and represent them in either graphs or charts.



01

Representation through Graphs

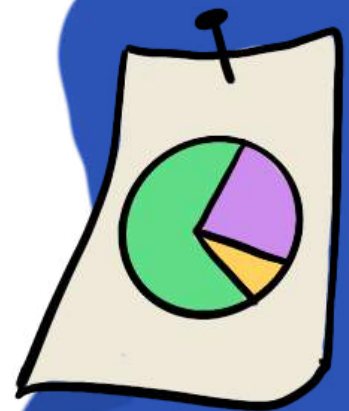
Graphs and charts are effective visual tools because they present information quickly and easily



02

Representation through Pie Charts

Pie charts is a fun chart to convey data. It is simple to draw, and you can easily convey the information through it.



03

Word clouds

The best way to describe what users feel or think about your product is through word clouds. To create word clouds, you need to find common terminology or word choices that come up during user testing.



💡 Pro Tip:

<https://www.freewordcloudgenerator.com/>
to generate word clouds, export them as
PNGs or SVGs and add them to your
report.

04

Empathy Mapping

To know your users better, you need to think the way they do. Empathy mapping is the best way to get inside a user's head with no bias. When you're being empathetic towards your users, they'll love the extra effort you put in to make their experience better.

Here's what we gather in an empathy map:

What does your user hear?

What does your user think and feel?

What does your user say?

What does your user see?

During Empathy Mapping, Fill Your Sticky Notes With Answers To Questions:

04.1

What does your user see?

- What's the user's daily experience like?
- What do they know of your competitors?

04.2

What does your user do and say?

- How do they conduct themselves? What are their tendencies and behaviors?
- What's your user's attitude and how do they communicate?

During Empathy Mapping, Fill Your Sticky Notes With Answers To Questions:

04.3

What is your user thinking and feeling?

- What makes them feel good and bad?
- What worries them?
- What obstacles stand in their way of achieving success?

04.4

What does your user hear?

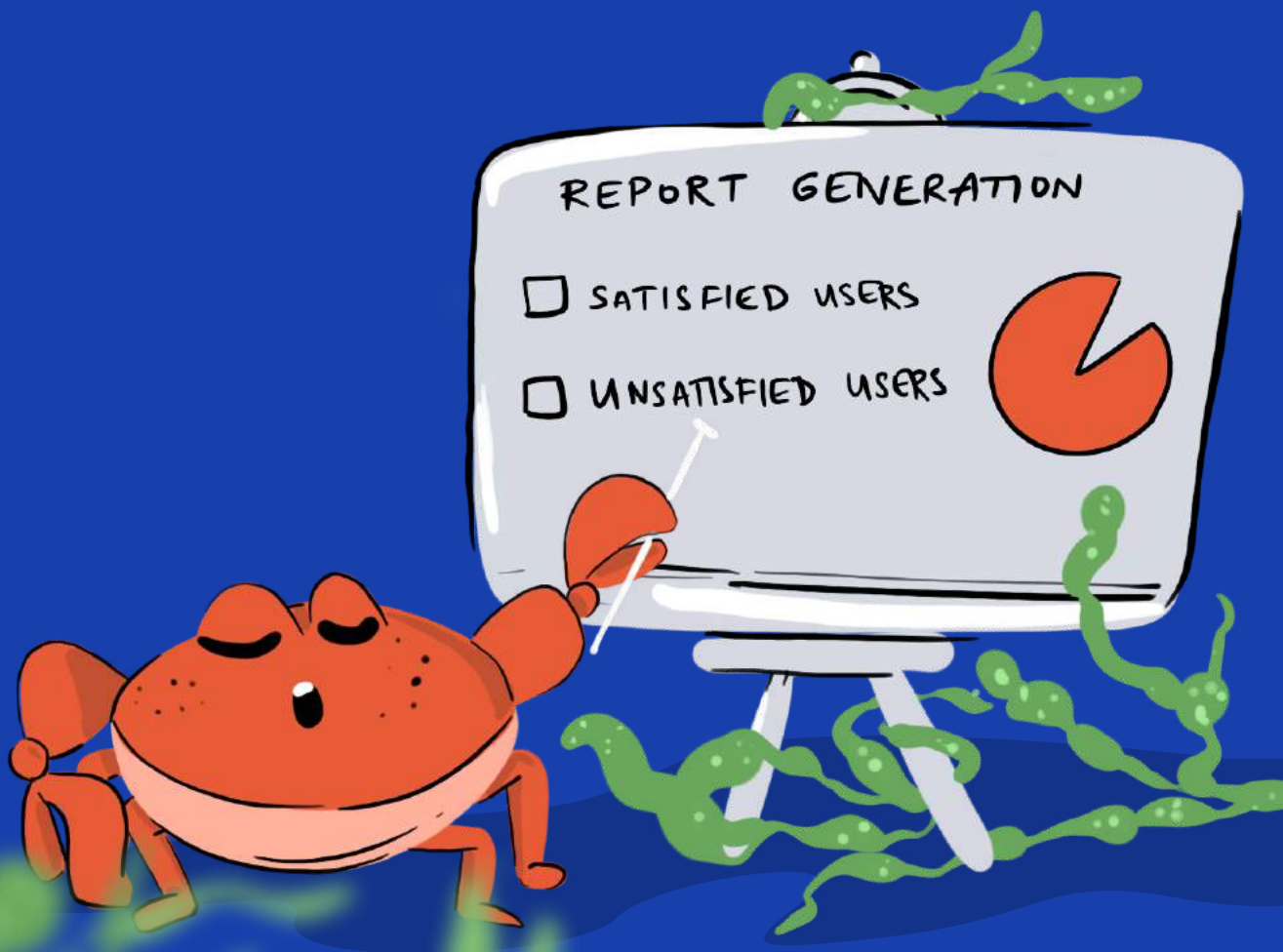
- What are they hearing from friends?
- What are they hearing second hand?

Chapter 6:

SEE THE DEEP SEA

Reaching here was not an easy task. Sushi and Jelly have learnt and stumbled at many places, but now they're nearing the end.

Time for them to assemble..the puzzle they created.



What goes into the Final Report?

A report is what you share with your respective stakeholders and clients. This is the finale of the interesting story you've been creating for so long.

Creating a report will help you look back on certain decisions you took and finally give the answer to what's working and what's not. Here's a general framework for creating a report that's easy to sail through.



Why

You start with a small executive summary of why you started user testing and why it was important.

EG:

Agenda – Through this usability testing, we’ve tried to understand the user’s opinion/experience on our new add-on feature of color customization on our e-commerce app.

What

Here, you talk about what you’re trying to achieve from this testing or the goal you look forward to hitting. Also, mention the task that you made the user perform during the UT.

EG:

Task: Assume that you are going through the men’s category, and you like a shirt; try to purchase the shirt in different color options and buy it using UPI.



How & Who

Here is where you mention every detail about how the whole testing took place, the people behind it, the users, the methods and tasks you conducted. Don't leave out anything and make it as intensive as possible.

Eg:

Number of users tested: 10

Age group: 21-50 years

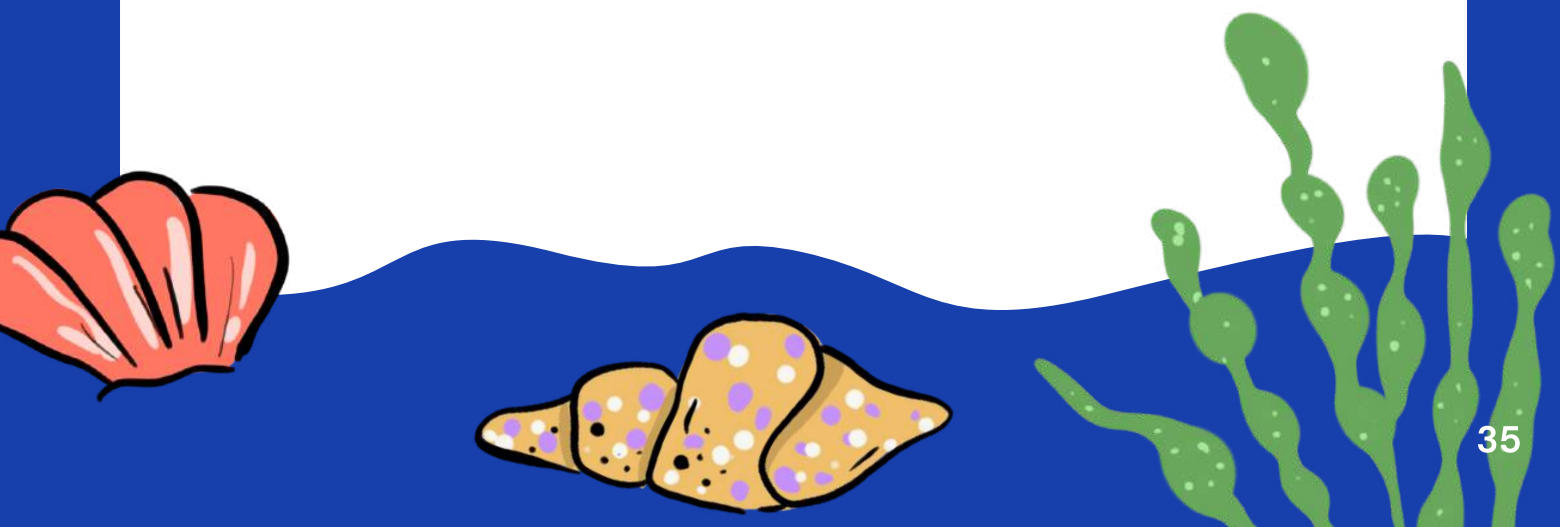
Number of users who successfully completed both the tasks: 100%

Locations: Mumbai, Bangalore, Delhi, Himachal Pradesh

Usability Testing environment: Virtual

Results

You need to add in visual treats of all the results you got from going through the user testing. Pies, graphs, maps, everyone are your friend here. It's good to have a balance of both data and visual elements.





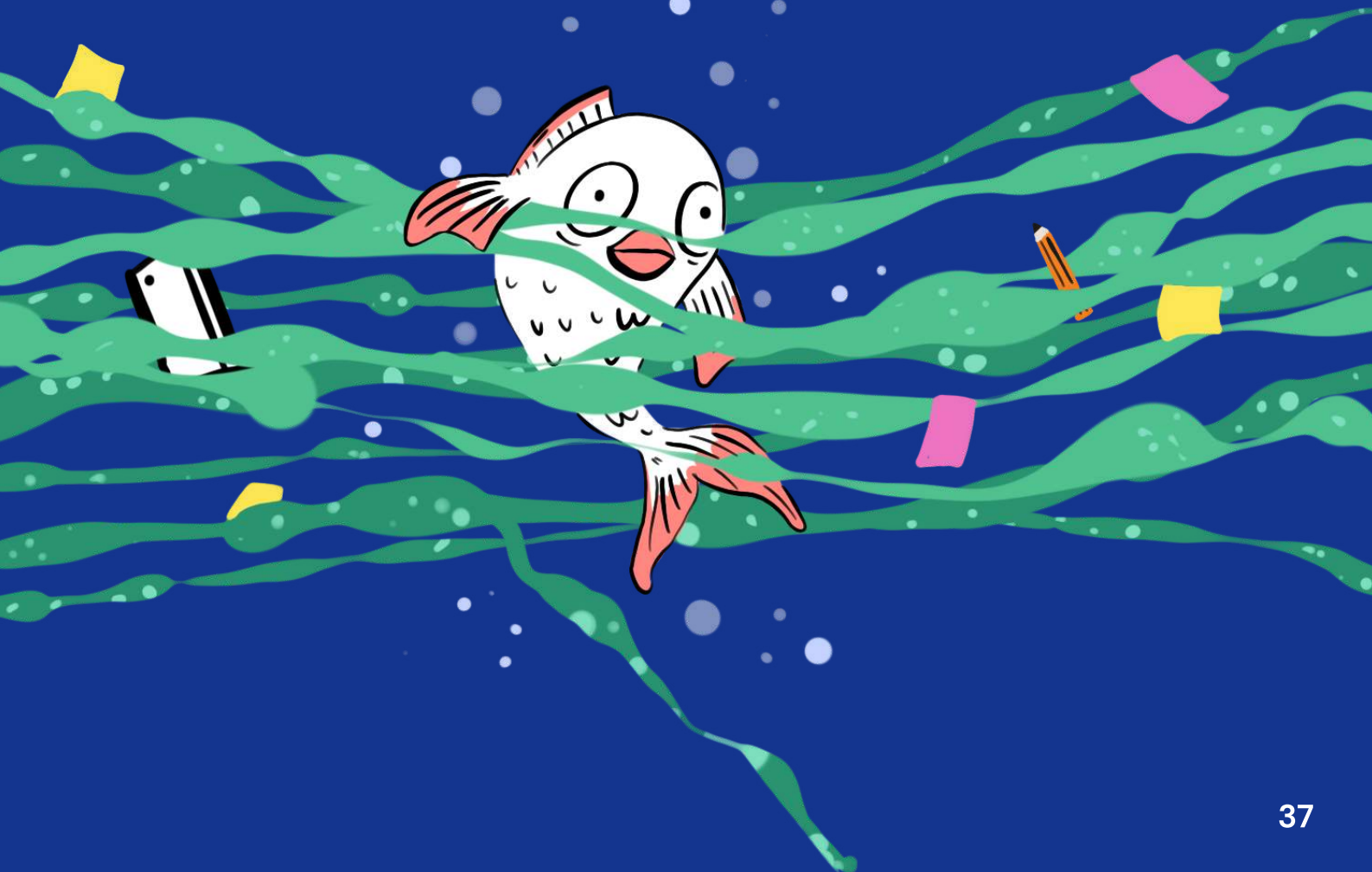
Report closure:

Close your report the right way by providing recommendations and action points you'll be going through. Talk about the solutions and what the future looks like. You can add in tasks you'll be achieving based on priority and the effort it will take to complete them to make the conclusion more persuasive.

Chapter 7:

CAREFUL OF THE SEAWEED!!!

You're not in deep sea until you find yourself tangled in seaweed. We're here to rescue and warn you ahead because we've been through the same stream. Here are a few things you could avoid during your usability testing.



01

Don't ask leading questions

Ask questions that are neutral and avoid pushing the users in only one direction. Avoid hinting answers in your question.

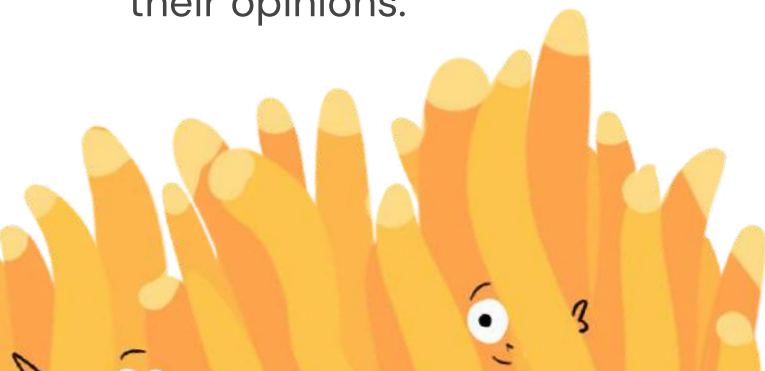
"How satisfied are you with our product?"

"How do you feel about this product?"

02

Don't make users uncomfortable

Make sure your user feels comfortable and avoid questions that might make them uneasy. Give them room to express their feelings and a space to voice out their opinions.



03

Don't let the conversation out of hand

When you're testing a product as a facilitator, it is your responsibility to guide how the conversations go. Keep circling back to the point even when the user moves away from it.

04

Don't defend your product

When users share their opinion, even if that doesn't sit right with you, it's important to have an open mind and understand their point of view. Avoid being judgemental about how a user behaves during the testing or towards the product.



Chapter 8:

THE FINAL ROW

You've reached the end! But wait before you close the book, We have a small gift for you. Here are amazing resources that will help you every time you're stuck in shallow waters. Go ahead and start testing.



Checklist, Data and Research

There are no rules on how to use these templates. We've tried our best to ensure it fits your needs and assist you during the journey. Think of all templates, resources and checklists as your torchlight that helps you see clearly, but the path and step you take will always be yours.

We've taken an example of conducting usability testing for a lifestyle e-commerce platform, so you can relate and understand better.

How to test usability Offline?

Conducting usability testing offline is a huge plus because it gives you a chance to see your users as they explore what you created for them. So here are few ways you can make your offline testing more fruitful.

Prepare a plan:

Think of what are your goals, what do you want user to do and what questions will help you achieve your goal. Document it in detail, so everyone involved will have a clear idea.

Get your script ready:

It's important that you have control of what user's a meant to do during user testing.

Find users

One perk of conducting your testing offline is that the environment is not limited to a screen. You can even go to a coffee shop and request a random person to be a part of your Usability Testing session, this will help you approach a diverse set of people.

Test

If your product is live you can conduct face-to-face interview or unmoderated tests. If you're testing through a prototype, you can share a prototype with them.

Audio record the session

You can audio record the session (only with the candidate's consent) so you can visit the same anytime in the future.

How to test usability Online?

Conducting a virtual session would be a little tricky wherein you don't have the users in front of you. Since you can't read facial cues of your user, try asking more questions about what they feel while performing the task, whether or not there was any step where they felt confused and didn't know where to go etc.

Also, finding the right candidate for your Usability Testing is slightly tougher in online environment. Based on your target audience, you can shortlist candidates and schedule the sessions as per the mutual availability.

We've shared a list of tools you can use to make your Usability Testing seamless.

To conduct and analyse Usability Testing on wireframes/ designs

- Userberry
- Lookback
- Hotjar
- Maze

To document results:

- Google Doc
- Google sheets
- Notion

To present the report:

- Figma
- Pitch
- Google Slides

Meet your Characters:

You'll be part of many usability tests where you can be a facilitator, observer or even the user. Here are few things to remember when you pick these characters.



Who's a Facilitator?

Hi! I'm the facilitator. My role is to introduce myself and my friend, the observer. I'll be the one guiding our users throughout the process and asking them questions wherever I want more information.

Roles and Responsibilities of a Facilitator

Before the session

- Document problem statement and potential outcome you expect from usability testing
- Create a schedule of forthcoming test sessions.
- Prepare scenario you want to test.
- Keep a list of questions and pointers ready.

During the session

- Introduce yourself and everyone present in the room with you. Thank the user for taking their time out to be part of the testing.
- Provide clarity to the user on what they'll be doing during the process and what's expected of them.
- Reduce tension in the group. Give one task at a time
- Take charge wherever required. E.g.: I like the points you've raised on this, I would also like to know what do you think about [restate to main topic]
- Your goal as a facilitator to not have an answer for every question your user asks but to help them find their own answer.

After the session

- Thank the user for taking out time for the session
- Send out the form at the end of the session and make sure that the candidate fills the form.
- Answer and acknowledge all questions and concerns that the candidate might have.

Meet your Characters:



Observer

I'm the observer. I don't talk a lot, and you might almost forget me, but I notice how the user behaves and note down every feedback they give.

Best tips for an Observer

- Read the plan and script framed by facilitator.
- Try to be as quiet as possible. When you talk or provide answer to the question it creates a bias towards how a user might react.
- Smile and nod during the testing process.
- Take notes and highlight any terms user might be specifically using.
- Thank user and facilitator after the session is complete.

Moderator Checklist

The main purpose of this checklist is to quantify your analysis. You can choose your parameters based on what is the most important part you're testing. Example if you're planning to test the time taken for your user to buy something they like then a parameter would be "User was able to buy desired products under 10 mins."

Your checklist can be measured in many ways,

On a scale of 1 – 5, where we assume 1 is difficult and 5 is easy for user to complete

Easy, moderate, difficult scale can be useful to measure pre-defined tasks.

Here's an example of how a moderator's checklist might look when you're testing your e-commerce product.

Moderator Checklist

1. Navigation through shirts in men's category



Easy



Moderate



Difficult

2. Understandability of available colours feature



Easy



Moderate



Difficult

3. Selection of different colour option



Easy



Moderate



Difficult

4. Understandability of price difference of different colours



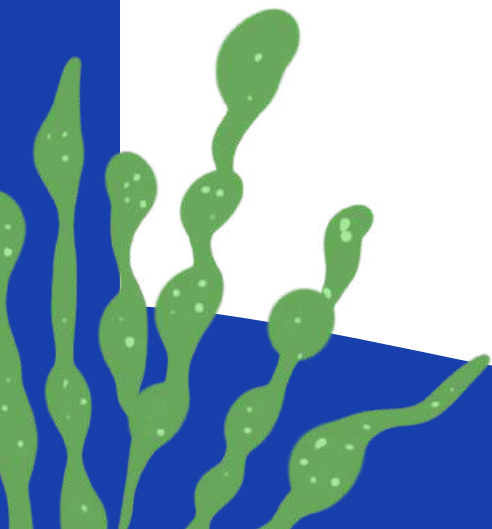
Easy



Moderate



Difficult





Script Template

Opening Talk

Start with thanking user for their time.

Introduction

Welcome I'm <Facilitator's Name> and I'll be walking you through today's session. I also have <Observer> who will take notes for this session.

Brief about the purpose of this testing

I'll start by sharing the purpose of today's session. <We're building an e-commerce platform, and we're here to test if the product meets our user's needs. > This session will take <Time that will take for this session to complete. >

Give instructions to the participant

I would like to start by letting you know that we're only testing the platform and the user experience, not you. So don't worry about making any mistake.

As you interact with our product, I would like you to be as vocal as possible, think out loud and during each step take us through what you're trying to do and what did you expect. Your honest opinion and feedback will be really helpful. Also, don't worry thinking if your feedback might hurt us, we're all here to improve user experience, and we require your honest feedback to do that.

You're also free to ask questions you have during the session. While I might not have all the answers, I will note them down and provide them at the end of the session. If anytime during the session you feel like taking a break, please let me know.

<Ask your participant if they understood and have any doubts before proceeding>

Asking consent

I would like to ask for your permission to record this session. This recording will only be seen by people working on this project, and we will only use your input to improve the overall product. If you feel uncomfortable with the study, please let us know. You can also withdraw from this study at any point in time.

Do you have questions before we proceed?

<Start recording>

Icebreaker

Ask a few personal details about the user that will help you break the ice. Ask for details about using your product or similar products in the past. E.g.: How familiar are you with e-commerce platforms? What do you like about them? What do you usually purchase on e-commerce platforms?

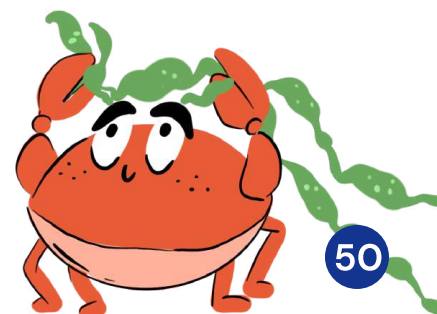
Begin with the Task

Wrapping up

Ask questions such as how did they feel during the testing, what did they like or dislike the most about the product, Any terms they had difficulty understanding?

Closing talk

This brings us to the end of this session. Thank you for taking out the time and providing your valuable inputs. Your feedback will surely help us improve our product. We'll be sharing a feedback form, feel free to give your feedback and ask questions. Have a good day!



System Usability Scale (SUS) in Analysis

When SUS is used, participants are asked to score the following 10 items with one of five responses that range from Strongly Agree to Strongly disagree:

1. I think that I would like to use this system frequently.
2. I found the system unnecessarily complex.
3. I thought the system was easy to use.
4. I think that I would need the support of a technical person to be able to use this system.
5. I found the various functions in this system were well integrated.
6. I thought there was too much inconsistency in this system.
7. I would imagine that most people would learn to use this system very quickly.
8. I found the system very cumbersome to use.
9. I felt very confident using the system.
10. I needed to learn a lot of things before I could get going with this system.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
-------------------	----------	---------	-------	----------------

Formula to calculate SUS

- Strongly Disagree: **1 point**
- Disagree: **2 points**
- Neutral: **3 points**
- Agree: **4 points**
- Strongly Agree: **5 points**

Looking at a respondent's answers and the corresponding number score for each response, you can tabulate the overall SUS score by using the following framework:

- Add up the total score for all odd-numbered questions, then subtract 5 from the total to get (X).
- Add up the total score for all even-numbered questions, then subtract that total from 25 to get (Y).
- Add up the total score of the new values (X+Y) and multiply by 2.5.

Example scoring:

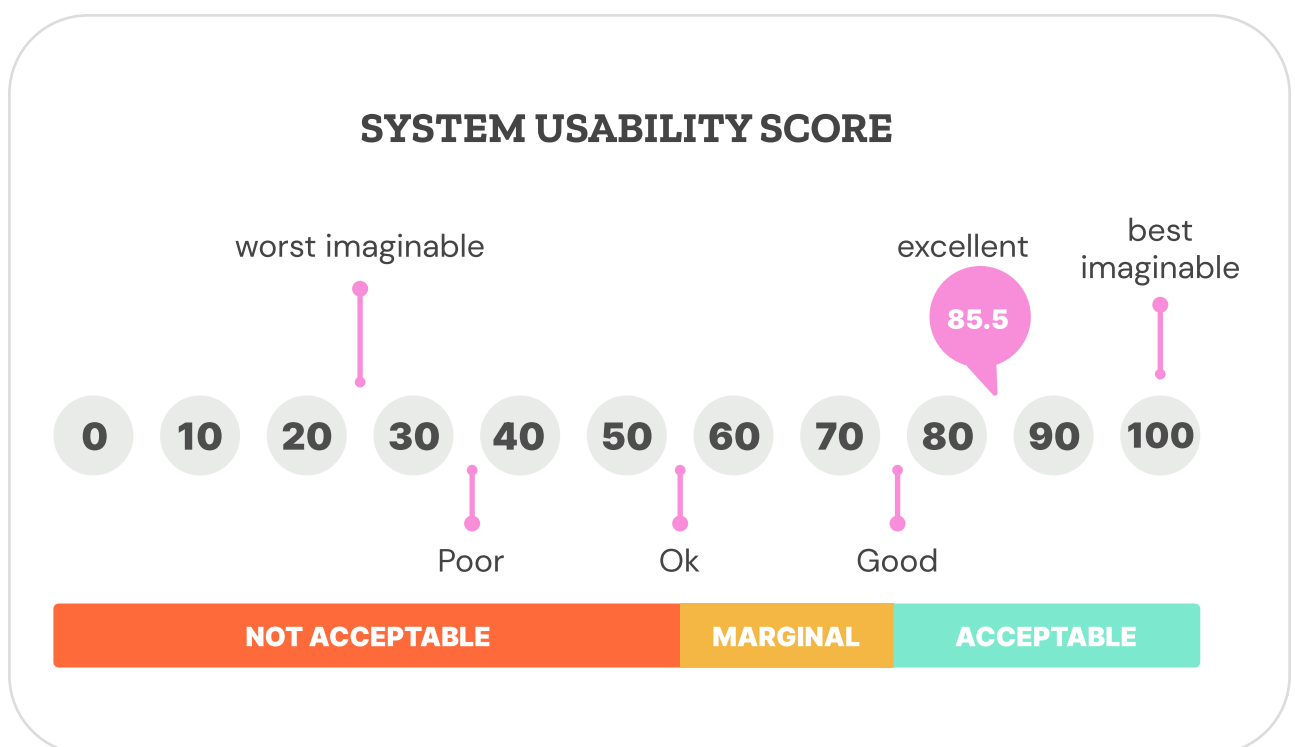
$$\text{Odd} = (4+5+3+4+3) = 19 - 5 = 14$$

$$\text{Even} = (2+1+3+1+1) = 8 - 25 = 17$$

$$\text{SUS Score} = (14+17) \times 2.5 = 77.5$$



Scores below 68 point to issues with the design that need to be researched and resolved, while scores higher than 68 indicate the need for minor improvements to the design.



SUS scores will fall into a range of categories: best imaginable, excellent, good, OK, poor and worst imaginable. It is up to the UX designer to determine a follow-up course of action. This can include detailed testing to find the root of the problem and existing pain points, or a rethink of the design solution entirely.

What to do in the case of very low SUS scores?

Scores below 51 require immediate attention with regard to usability issues or pain points that need to be remedied or investigated further. UX practitioners can consider a quick list of issues to investigate, particularly those that prevented the user from being able to complete a specific task during testing:

- Does the navigation lack intuitive structures or hierarchy?
- Are labels clear and understandable?
- Are content taxonomies intuitively categorized and discoverable?
- Are tasks and user flow overly complicated?
- Does the design solution create frustration or repeated task errors?

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With 🧡 Zeta Design Team