

January 11, 2006

To: Usability Research Group

From: Jason Palmeri

Re: Requirements for Usability Research Plan

To prepare for conducting your usability research study, you must first create a detailed research plan. This plan should include:

- Purpose / rationale
- User profiles
- Interview script (welcome/introduction; user experience analysis; task-based testing, general feedback)
- Technologies and team member roles

Purpose / Rationale

In this overview section, you should concisely outline the goals of your user interview study:

- What do you hope to find out about the users' experiences of the financial aid website?
- What methods will you use to collect data from users?
- How does your usability research plan address the concerns of your client (Marilyn Lee and Doug Wilson from the Financial Aid Office)?
- How does the design of your study build upon the work of usability experts (Barnum, Schriver, Kuniavsky)?

User Profiles

While you only need to complete interviews with three users, you should recruit four potential interviewees. In this section of the plan, you should briefly describe the users' demographic characteristics (age, gender, race/ethnicity, abilities), their experience using the web, and the frequency with which they do or do not use the financial aid website. You should then explain how the characteristics of your users influenced how you designed your research project.

The Interview Script

To prepare for the interview, you must have a detailed script. This script will outline exactly what will happen in each of the four sections of the interview:

- Welcome / introduction
- User experience question
- Task-based testing
- Site feedback questions

The script should be written out verbatim; however, you may deviate from it somewhat when you do the interviews in order to respond to the concerns of the user or to create a more natural feel.

Part one: Welcome and Introduction

Your welcome and introduction should introduce the user to the procedures of the interview and put him or her at ease.

Part Two: User Experience Questions

For this you section of the interview, you will write 4-7 open-ended questions designed to elicit insights into:

- The mental models and vocabulary users have for understanding financial aid.
- The emotions, concerns, interests, and beliefs users have about financial aid.
- The mental models users have for understanding and interacting with websites.
- The preferences users have for the design, content, and organization of websites.

At this point, you should not have the students look directly at the financial aid website (though you might potentially have the user show you other websites they like or dislike). Your questions should use simple language, and they should be designed to elicit in-depth answers (specific examples and stories). To this end, you should also include a list of generic follow-up questions you can use to provoke more in-depth responses.

Part Three: Task-Based Testing

For this part of the test, you will develop three scenarios that ask users to find and interpret a particular piece of information on the site. The scenarios should use simple “layperson” language, and they should not give away the precise path for finding the information. In addition to writing the scenarios, you should also write several generic questions for prompting users to “think aloud” while they are working.

Finally, you should write a detailed description of the “ideal” steps the user would take to complete the scenario as well as the ideal time in which the scenario should be completed.

Part Four: Site Feedback Questions

In the final section of the interview, you will ask the user to provide general feedback about the site. You might ask the user to look at or read particular section of the site, but you won’t ask him or her to go looking for particular kinds of information. Instead, you should develop 3-4 general questions designed to elicit:

- How the site influences the user’s image of the financial aid office.
- What aspects of the site most stand out to the user.
- What content on the site most appeals to the user.
- What factors would motivate the user to read or not read content on the site.

Technologies and Team Member Roles

At minimum, you must create a digital audio record of your interviews and take detailed notes about how users went about completing the scenarios. I will give you more detail about your options for recording data later on in class.

In this section of the plan, you will outline:

- Where you will conduct your user interviews (rooms, computers, browsers).
- When you will conduct your interviews.
- What roles each of the team members will play in the interviews.
- What methods you will use for recording data.

Evaluation

To be successful, this plan should:

- Be complete (including all requested information).
- Follow standard conventions of grammar and style.
- Be clear and easy to read.
- Address the concerns of the client and build your ethos as a usability expert.
- Develop questions and scenarios that are likely to elicit useful, detailed responses from users.

Due Dates

On Wednesday 2/1, regularly scheduled class will be cancelled. Instead your group will sign up for a meeting with me (45 minutes to an hour). At this meeting, you will bring a rough draft of your plan. We'll read it aloud together, and I'll give you feedback. The final draft of the plan will be due on Wednesday 2/8.