Usability Testing Plan Template

Use Cases and User Stories

Useful Links

Add Links Here using 'Command + K' (Mac) or 'Control + K' (PC)

User Stories

Add user stories related to the tasks you expect users to be able to complete with your solution. If this is the first usability test you're doing for your design, try to focus on the most important/highest priority tasks first. You may not be able to test all of the user stories in one session, but you can use this document to keep the user stories so that you can prioritize them for testing.

You can also link to a backlog if your user stories are in a platform like Jira, and copy and paste the user stories here as you prepare to test them.

#	As a _____	I need to _____	so that _____
0	*manager*	*approve a timesheet for my team members*	*they can get paid*
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Scenario-Based Tasks

#	Context	Primary Instructions	Secondary Questions and Instructions
0	*You are a manager at XYZ Software. It is Friday and you need to make sure all of your team members' timesheets are approved today.*	*Using the Dayforce application, show me where you would find your employees' timesheet information.*	*Whose timesheets do you still need to approve?* *Show me how you would approve Jacob's timesheet*
1			
2			
3			
4			
5			
6			
7			
8			
9			

#	Context	Primary Instructions	Secondary Questions and Instructions
10			

Recruiting

Target Users

In this section, clarify which user groups you want to focus on for the test. For help, look above at the user stories section under the "As a _____" column.

- Managers at # size company who x, y, z

Screener Questions

What are you going to ask users and who will be included/excluded from participation?

1. *Which of the following best describes your current work situation? (Select all that apply)*
   a. *Employed full-time with one company -* **ACCEPT**
   b. *Employed part-time with one company -* **ACCEPT**
   c. *Employed at more than one company -* **ACCEPT**
   d. *Seeking a new role -* **ACCEPT**
   e. *Retired -* **REJECT**
   f. *Not currently working -* **ACCEPT**
2. *What is your current role? (select all that apply)*
   a. *Employee (salaried)*
   b. *Employee (hourly)*
   c. *Freelance (pay-as-you-go)*
   d. *Freelance (lump-sum) -*
   e. *Freelance (time-frame)*
   f. *Manager -*
   g. *Recruiter*
   h. *Administrator -*
   i. *Other: specify*

Testing Methodology and Schedule

Decide between Iterative and In-Depth, and between Moderated and Unmoderated Testing, and highlight your choice below.

Iterative Testing

What It Is

- A type of usability testing that involves creating a design or wireframe, testing it with 1-3 users, changing the design, and running again
- Works best to refine concepts into a design
- Usually around 15 users complete tasks
- Different users will likely evaluate different prototype versions
- Analysis is done after each participant

When To Use

- Early conceptual work
- Designs are expected to change substantially as more information is gathered
- Designs are less "concrete" (wireframes, low fidelity)
- Working within an agile framework
- User tasks may change between tests
- Shorter product timelines

Standard/In-Depth Usability Testing

What It Is

- Deeper study of a design to understand whether it is usable by a larger and more inclusive group of users
- Works best to understand whether a more concretely defined design is usable
- Usually 6-10 users complete tasks
- All users test the same prototype and analysis is done at the end

When To Use

- When validating a design before launch
- Re-evaluating a system after a design change is proposed
- Evaluating a system in its current live state to determine what changes should be made to improve it

Moderated Usability Testing

When To Use

- When you want the opportunity to ask follow-up questions
- If you want to ask users to perform different tasks based on how they answer certain questions

Unmoderated Usability Testing

When To Use

- When you don't need to be there to moderate the testing
- When you're on a shorter timeline
- When you want to collect more responses

• If you're new to usability testing, and want to practice interviewing and get more context • If you want to take notes and start to pull out key findings during the interview • If you'd like stakeholders and team members to participate and ask the user questions if there's time Considerations • Can make it harder to schedule with participants • Takes time to schedule and attend sessions • Need note-taker, interviewer and participant available at the same time • Longer timeline to complete testing (usually 3-4 weeks minimum)	• If you're comfortable creating studies in UserTesting Considerations • Harder to ask follow-up questions

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Standardized Assessments

SUS

https://www.usability.gov/how-to-and-tools/methods/system-usability-scale.html
https://measuringu.com/sus/

UMUX

https://measuringu.com/umux-lite/