User Testing

What it is

The **User Test** is a qualitative investigation technique which allows a prototype to be tested with real users. It can be done with prototypes with varying levels of refinement.

The user must perform a series of tasks and their feedback is collected.

Why use it

• To see whether users understand the solution

• To see whether the solution enables them to complete the tasks or not

• To collect feedback in order to iterate toward better options

• To involve the user and hear from them directly run with.

How to use it

The complete process for performing a User Test follows the procedure initially presented at the beginning of the Evaluation section. The stimulus in this case is an interactive prototype and a list of tasks for the user to perform.

1. Prepare the test with the Planning the User test template **A**

2. Conduct the test with the Task Analysis template **B**

3. Analyse the experience after the test with the Experience Analysis template **C**

Iteration: Using the findings from the different tests, identify the opportunities for improvement, think of ideas to solve them and refine your solution.

User Testing: Step1

	Task 1	Task 2	Task 3	Task 4	Task 5
User's objective					
Success metrics		**A**			
Elements to observe					

User Testing: Step 2

	Task 1 OK/KO	Task 2 OK/KO	Task 3 OK/KO	Task 4 OK/KO	Task 5 OK/KO
Success					
Obstacles			**B**		
Facilitators					
Observation The main objective here is to observe the user's behaviour more than their opinions					

User Testing: Step3

Experience being tested	User Name User profile	Experience being tested	User Name User profile
Experience evaluation How was the experience? What is the user's opinion with regard to its design? Was there anything to criticise?		**Experience evaluation** How was the experience? What is the user's opinion with regard to its design? Was there anything to criticise?	
Exploration Positive aspects / Negative aspects	**C**	**Exploration** Positive aspects / Negative aspects	
Things to add / Things to leave out / Things to change		Things to add / Things to leave out / Things to change	
Final evaluation / Degree of acceptance		Final evaluation / Degree of acceptance	

Tips & Tricks

TEAM
1-5 people

TIME
45 minutes to an hour and a half for each test, depending on the details and number of stimuli presented to the user.

MATERIALS
Interactive prototype, list of tasks.
Recording device or video camera.
Paper, pencil, printout of Task Analysis Canvas, printout of Experience Analysis Canvas.

FOR BEST RESULTS
Let the user speak, try to help them as little as possible.
Remember that it is not an evaluation of yourself.
Write down carefully everything you observe.
Use complete sentences and include quotes from the user, as this will be of help later on.
If you haven't had enough time to write everything down during the test, take some time just afterwards to write while it is all still fresh in your mind.

WHAT IT HELPS YOU ACHIEVE

• User feedback at a very early stage
• New ideas
• Validation or rejection of your hypothesis
• Iteration integrating the user's point of view.

FOR AGILE

Identify and prevent implementation and usability errors that might affect the experience. Improve the user stories.

TOOLS AND ACTIVITIES BEFORE YOU START

• Interactive prototype
• List of tasks defined in the Planning the User
• Test Canvas

TOOLS AND ACTIVITIES FOR AFTERWARDS

• Iterations with the interactive Prototype
• If needed, iterations with the Concept Map, the Journey and/or Design Principles (or draw them up).

User Testing: Step 1. Planning the User test

1. Prepare the Test (with the Planning the User test template)

How to use it

1. Define the tasks that the user must perform (goals and tasks). **A**

2. Define what you consider to be success or not.

3. Define the concrete aspects to evaluate (functions, appearance, texts, layout of the elements). **B**

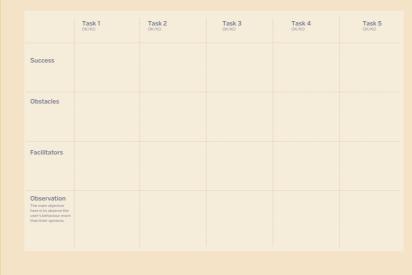Make sure that the stimuli will enable the user to perform the tasks. **C**

	Task 1	Task 2	Task 3	Task 4	Task 5
User's objective	A				
Success metrics	B				
Elements to observe	C				

User testing steps

STEP 1. PREPARE THE TEST

	Task 1	Task 2	Task 3	Task 4	Task 5
User's objective					
Success metrics					
Elements to observe					

STEP 2. CONDUCT THE TEST

	Task 1 OK/NO	Task 2 OK/NO	Task 3 OK/NO	Task 4 OK/NO	Task 5 OK/NO
Success					
Obstacles					
Facilitators					
Observation The main objective here is to observe the user's behaviour more than their opinions					

STEP 3. ANALYSE THE EXPERIENCE AFTER THE TEST

Experience being tested	User Name User profile	Experience being tested	User Name User profile
Experience evaluation How was the experience? What is the user's opinion with regard to its design? Was there anything to criticise?		Experience evaluation How was the experience? What is the user's opinion with regard to its design? Was there anything to criticise?	

Exploration
Positive aspects / Negative aspects

Exploration
Positive aspects / Negative aspects

Things to add / Things to leave out / Things to change

Things to add / Things to leave out / Things to change

Final evaluation / Degree of acceptance

Final evaluation / Degree of acceptance

User Testing: Step 1. Planning the User test

Test objective

	Task 1	Task 2	Task 3	Task 4	Task 5
User's objective					
Success metrics					
Elements to observe					

User Testing: Step 1. Planning the User test

Test objective

To test the prototype constructed with AI technology, observing how the user carries out the task and asking them some questions immediately afterwards.

	Task 1	Task 2	Task 3	Task 4	Task 5
User's objective	Register on the app and synchronize with their bank account	Personalize the app's options	Asks Buddy a troubleshooting question	Contact the call center from within the app	Talks with call center to resolve the issue
Success metrics	Managing to complete the task in less than 1 minute	Managing to complete the task in less than 2 minute	Obtaining the desired details in under 3 minutes And not have any doubts about them!	Managing to complete the task without requesting assistance in less than 5 minutes 2 minutes	Managing to resolve their query in less than 5 minutes
Elements to observe	What are their main difficulties in performing this task? How do they react to having to register?	What are the personalization options that catch their attention most? Does the user identify with their assistant?	What details interest them most? Do they also write things down on paper? At what moments do they stop to reflect?	What do they do to try to complete the task?	How do they react to this task? What tone do they take with the Call Center?

How many users

Here are some suggestions and tips that might help you getting the most of your user test planning.

- Based on Jacob Nielsen's experience in user testing and usability the minumum numbers of users of a same profile you need to have is five. Test 5 users lets you find almost as many usability problems as you'd find using many more test participants.
- If you want to test your prototype with more than one profile of users, you will need to have five of each profile.

Type of tasks

- Direct tasks: are considered instructional tasks. Example: "Enter the website and find a credit up to 9000€". Those tasks are more technical and could detract from the user's experience of the product as a whole.
- Scenario Tasks: are tasks that phrases the instructions in a real-life example: "You're getting married and you want to improve your budget for the wedding party. You enter the website looking for a credit up to 9000€. This type of task tasks help the user forget that they're taking a test.

User Testing: Step 2. Task Analysis

2. Conduct the Test (with the Task Analysis template)

How to use it

For conducting the test follow the next steps using the Task Analysis template

1. Present the context in which the application or web is to be used (in the case of a user not matching up perfectly with the necessary profile, put them in context).

2. Assign a task, observe and write what happens on the template **A**

3. Invite the user to think out loud. Don't give solutions, return the questions. It only helps if the user gets frustrated.

4. Write down all the results on the analysis template (success, obstacles, facilitators). **B**

5. Once the tasks have been completed, ask what the experience was like.

6. Review the barriers with the user and explore specific aspects. **C**

7. Try to understand the changes necessary for improvement.

8. Evaluate the experience and the user's acceptance.

	Task 1 OK/KO	Task 2 OK/KO	Task 3 OK/KO	Task 4 OK/KO	Task 5 OK/KO
Success					
Obstacles					
Facilitators					
Observation The main objective here is to observe the user's behaviour more than their opinions					

User testing steps

STEP 1. PREPARE THE TEST

	Task 1	Task 2	Task 3	Task 4	Task 5
User's objective					
Success metrics					
Elements to observe					

STEP 2. CONDUCT THE TEST

	Task 1 OK/KO	Task 2 OK/KO	Task 3 OK/KO	Task 4 OK/KO	Task 5 OK/KO
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Obstacles					
Facilitators					
Observation The main objective here is to observe the user's behaviour more than their opinions					

STEP 3. ANALYSE THE EXPERIENCE AFTER THE TEST

Experience being tested	User Name User profile	Experience being tested	User Name User profile
Experience evaluation How was the experience? What is the user's opinion with regard to design? Was there anything to criticise?		Experience evaluation How was the experience? What is the user's opinion with regard to design? Was there anything to criticise?	
Exploration Positive aspects / Negative aspects		Exploration Positive aspects / Negative aspects	
Things to add / Things to leave out / Things to change		Things to add / Things to leave out / Things to change	
Final evaluation / Degree of acceptance		Final evaluation / Degree of acceptance	

User Testing: Step 2. Task Analysis

	Task 1 OK/KO	Task 2 OK/KO	Task 3 OK/KO	Task 4 OK/KO	Task 5 OK/KO
Success					
Obstacles					
Facilitators					
Observation The main objective here is to observe the user's behaviour more than their opinions					

User Testing: Step 2. Task Analysis

	Task 1 OK/KO	Task 2 OK/KO	Task 3 OK/KO	Task 4 OK/KO	Task 5 OK/KO
Success	OK	OK	OK	KO	KO
Obstacles	Entering the account number during registration is difficult because it is such a long number	There were too many personalization options. The user doesn't want to spend much time on that.	The Buddy's voice makes it somewhat difficult to understand the information	The user had trouble finding the information they wanted on the page	The fact that they receive a call and then have to repeat their query, and then be directed to the appropriate department means that it takes a long time to resolve the query.
Facilitators	The fact that registering is the only option on the page makes it easier to understand	Presenting an initial Buddy example helps the user decide how they want their final Buddy to be	The user's question was understood well. The fact that the dates were included in the answer helped resolve the query quickly	Asking whether the user wished to be redirected improved the experience	
Observation The main objective here is to observe the user's behaviour more than their opinions	It shouldn't be necessary to provide any further data beyond the account number in order to register. If the user already has the bank app, it shouldn't be necessary to ask for their account number	It would be good to inform the user that they can change their Buddy at any moment.	It is important that a "repeat" option appear immediately, in case the user doesn't understand the Buddy's reply.	It is VERY IMPORTANT that the user not be redirected to the start page, but directly to the place where they can find the information they need.	The person who calls the client should be someone who can provide an answer directly. They should already know the user's query.

What worked and what not?

Here are some questions that might help you getting the most of your analysis.

- What is working for users?
- What is not working for them?
- What confuses them or causes them concerns?
- Are their expectations met for the experience? Why or why not?

- Use this data to evaluate and identify patterns of task-flow errors. In addition, the qualitative component can help in identifying the potential WHY for any other task-flow issues that may be uncovered.
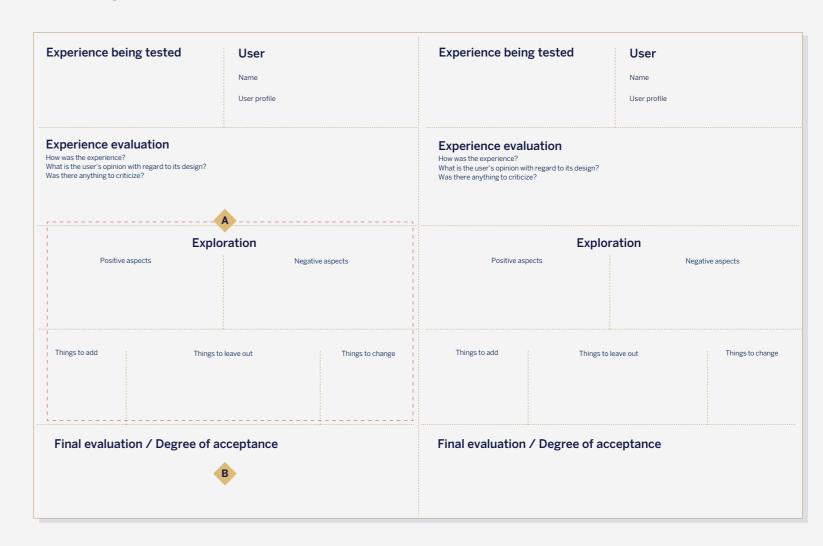
User Testing: Step 3. Experience Analysis

3. Analyze the experience after the Test (with the Experience Analysis template)

How to use it

1. Organize, input and analyze the information on the template. **A**

2. Explore the details from the user's perspective:

- positive aspects
- negative aspects
- things to add
- things to omit
- things to change.

3. Analyst the user's degree of acceptance of the solution, being honest about it. **B**

Experience being tested	User	Experience being tested	User
	Name		Name
	User profile		User profile

Experience evaluation
How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

Experience evaluation
How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

A

Exploration

Positive aspects — Negative aspects

Exploration

Positive aspects — Negative aspects

Things to add | Things to leave out | Things to change

Things to add | Things to leave out | Things to change

Final evaluation / Degree of acceptance

Final evaluation / Degree of acceptance

B

User testing steps

STEP 1. PREPARE THE TEST

	Task 1	Task 2	Task 3	Task 4	Task 5
User's objective					
Success metrics					
Elements to observe					

STEP 2. CONDUCT THE TEST

	Task 1 OK/KO	Task 2 OK/KO	Task 3 OK/KO	Task 4 OK/KO	Task 5 OK/KO
Success					
Obstacles					
Facilitators					
Observation The main objective here is to observe the user's behaviour more than their opinions					

STEP 3. ANALYSE THE EXPERIENCE AFTER THE TEST

Experience being tested	User	Experience being tested	User
	Name		Name
	User profile		User profile

Experience evaluation
How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

Experience evaluation
How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

Exploration
Positive aspects — Negative aspects

Exploration
Positive aspects — Negative aspects

Things to add | Things to leave out | Things to change

Things to add | Things to leave out | Things to change

Final evaluation / Degree of acceptance

Final evaluation / Degree of acceptance

User Testing: Step 3. Experience Analysis

Experience being tested

First "Your BBVA Buddy" prototype

User

Name: Maria

User profile: Aged 45, client, unaccustomed to technology

Experience evaluation

How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

The user assessed the experience as being simple and easy to use, considered the design to be user-friendly, intuitive and quick. Only a few things to criticize: being redirected to the bank's main page and the callback service

Exploration

Positive aspects

"Personalising the Buddy can be a lot of fun" "I feel that with this service I can resolve my queries at any moment and quite easily."

Negative aspects

Redirecting the user to the bank's main page instead of to the page where they could find the information they're looking for.

Things to add

More buddies, like funny characters instead of people. The personalization process could be more entertaining.

Things to leave out

X

Things to change

Direct the client to the correct place, both on the web page and with the Call Center

Final evaluation / Degree of acceptance

We have validated the concept and achieved a high level of acceptance.
Our design principles have also worked well, although some actions should be even more simple.

Experience being tested

First "Your BBVA Buddy" prototype

User

Name: Pablo

User profile: 50 years old, not a client, is used to technology

Experience evaluation

How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

A good experience, but it could have been more intuitive. The user had trouble performing some tasks, for instance personalizing his Buddy and synchronizing his account

Exploration

Positive aspects

The timely resolution of doubts and problems

Negative aspects

Registering and synchronizing is an annoying task.
There are a lot of personalization options for the Buddy: hair, eye color, etc. This task ends up taking a long time.

Things to add

X

Things to leave out

It is not necessary to have so many personalization options. Keep the gender and skin color options only.

Things to change

If they already have the bank app, don't ask for the account number, and once they've synchronized, don't ask them to register.
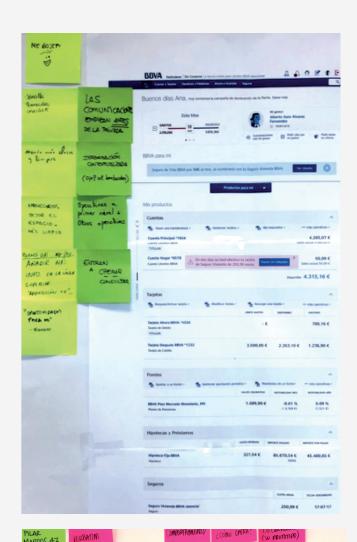
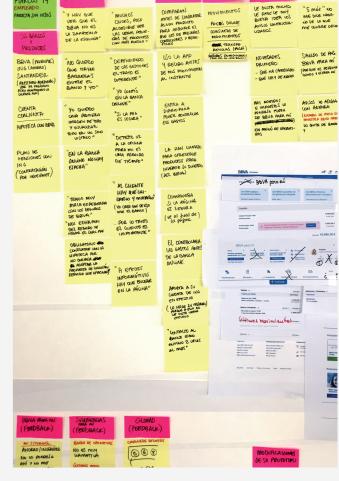### Final evaluation / Degree of acceptance

A good level of acceptance, but improvements are needed in the registration, synchronization and personalization experience.

Mental model fit and user's needs

Besides usability issues you might have to improve from your prototype, make sure your concept fit your user needs and expectations.

- Mental model fit: among user test results there might be findings, comments or behaviors that suggest how your potential users see the world in a certain way which impacts the way they interpret information and behave (e.g. users expect to have a discount after buy more than two products or services).

User Testing: Step 3. Experience Analysis

Experience being tested

User

Name

User profile

Experience evaluation

How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

Exploration

Positive aspects

Negative aspects

Things to add

Things to leave out

Things to change

Final evaluation / Degree of acceptance

Experience being tested

User

Name

User profile

Experience evaluation

How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

Exploration

Positive aspects

Negative aspects

Things to add

Things to leave out

Things to change

Final evaluation / Degree of acceptance

User Testing: Concept Test Feedback

Experience being tested

Your BBVA Buddy

User

Name: Sara

User profile: 51 years old, client, unaccustomed to technology

First Impressions/ Spontaneous Comments

How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

PROBLEM! Wants more details

Exploration

Positive aspects

- She found the concept simple and effective
- She liked being able to solve basic problems quickly

Negative aspects

- Not being able to obtain more details about her inquiry
- Bad (previous) experiences with the FAQs generate neg-ative expectations

Things to add

Redirect the client to a place where they can find more info in the bank's main app

Things to leave out

The option of personali-zing the assistant accor-ding to age. Doesn't care about assistant's age.

Things to change

The term "Callback"

Final evaluation / Degree of acceptance

Although she isn't used to using apps on her mobile, she would use this one. She considered this service to be necessary and says she would use it. However, not being able to obtain more details with regards to her query is an important issue that has to be addressed

Experience being tested

Your BBVA Buddy

User

Name: Juan

User profile: 38 years old, not a client, is used to technology

First Impressions/ Spontaneous Comments

How was the experience?
What is the user's opinion with regard to its design?
Was there anything to criticize?

Exploration

Positive aspects

- Voice activation
- Possibility of personalizing the assistant

Negative aspects

Didn't know the limits of the platform: "What can or can't be done with this technology?" "I don't want to activate My Buddy, take up my time to talk with it only to find out that my problem can only be resolved at an office."

Things to add

If the issue can only be resolved at an office, provide a location for the nearest one

Things to leave out

✗

Things to change

Make it clear from the start whether or not the particular issue can be resolved via this channel.

Final evaluation / Degree of acceptance

Good concept capable of attracting new clients interested in having more autonomy when it comes to managing their account.

Mental model fit and user's needs

Besides usability issues you might have to improve from your prototype, make sure your concept fit your user needs and expectations.

- Mental model fit: among user test results there might be findings, comments or behaviors that suggest how your potential users see the world in a certain way which impacts the way they interpret information and behave (e.g. users expect to have a discount after buy more than two products or services).