Testing by Videoconference:

Catch real users remotely

Moderator’s guide

This is a moderator’s guide for conducting usability tests with real users, whether out in the field or in the office connect with participants using video conference capabilities. Notes to the moderator/interviewer are italicized. Things for the moderator to say to the participant are black. It is written to test new material, but can be adjusted to work for any type of material – forms, notices, guides, and so on.

# Session Script: [Name] Material Usability Testing

## Overview of the Session (2 minutes)

*Greet the participant after they have connected to the video conference. Review the Consent Form with the participant and ask them to fill out the demographic questionnaire. Provide this to them through either the video conference functions or over email. Ensure that all cameras are on and available.*

*Read this to each participant:*

“Thank you for agreeing to participate. Today, we’d like to get your feedback about the [preliminary material name]. We are trying to understand how well it works for people like you.

For the next few minutes, I'd like you to act as if you are [what they will be doing]. I'll watch you doing that [if you have observers, mention that here]. I will be taking notes and listening carefully while you [work].

When you have finished, I’ll ask you some questions about what you thought of the [form/information] and what the experience of using it was like. The whole interview should take 15-30 minutes.

Thank you for helping us improve [what they are testing]. Your taking part in the study helps us evaluate how well it works. Do you have any questions at this point?”

## Tasks (up to 10 minutes)

*This section will vary depending on whether you are testing information, like a voter education brochure or a form and related instructions. You can start with the instructions or the form, if they are not in the same file*

* *Have the participant access the material through instructions. Make adjustments as necessary for people with disabilities.*
* *Introduce the material and give the material to the participant.*

*You’d do similar steps if you were testing a different paper form or getting feedback on a website or other materials.*

“The form you are using looks real, but it will really [complete the task]. By going through the process with us, you’re helping us learn where users like you might have questions or problems with using it.

This is the material I would like you to use. [Send the person the material with video conferencing tool or web link to material.]

Okay, let’s get started. Are you ready? Please share your screen to allow us the ability to watch your desktop as you enter information. Please try to do what you would normally do, not what you think I want you to do. If you’re unclear about a what data is required or what is being asked, do what you would do in a real situation.

From this point on, you should treat me like an election worker. If you have questions or problems with the material, ask me. I’ll note your question and if I can, I will help you.”

*While the participant is reading or filling in a form, observe them without disturbing them. You might want to take notes. Don’t teach them how to use the material (until the end of the session)!*

**What to look for while the participant works:**

* *How easily did the participant the information they needed?*
* *How easily did the participant find all the places they had to enter information?*
* *What problems did they have filling out the form? Why? What comments did they have about that?*
* *Did the participant skip any fields of data? Why? What comments did they have about that?*
* *What questions did the participant ask about while using the material? After using the material?*
* *Did the participant find the instructions?*
* *Did the participant read the instructions?*
* *If the participant did read the instructions, how helpful were they? What questions and problems did the participant have understanding the instructions?*

**Later:**

“Have you ever had to do this before? How do you do that using this material?”

“What do you do if you make a mistake?”

## Wrap-up and debriefing (5-15 minutes)

“Step me through what you did, please. Let's just go through it from where you started and tell me about any questions, doubts, or confusion you remember having along the way.”

*Ask participants follow-up questions if you need to. Try to keep questions open-ended. For example, if the participant missed data or didn’t provide accurate details according to your instructions, go to that place in the material and say, “Tell me more about what you did with the material here and why.” Or, “You said earlier that you didn’t feel confident using the material. Tell me about that.”*

*When you’re done with the review of their material, and if there is time, ask these questions:*

Tell me two things you liked about [the things they used]

Do you have examples of two things that could be improved?

How’s the text size for you?

How did using this material compare other times when you [did something like this]?

What help do you think that other people might need?

*Then wrap up the session by thanking the participant.*