

Fast and Budget-Friendly User Research and Testing

It is hard to fit proper user research and testing into our projects, so in this workshop, we will explore fast and budget-friendly approaches instead.

WORKSHOP

🗣️ PAUL BOAG





ABOUT ME

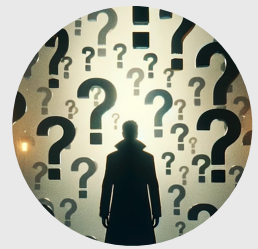
Paul Boag

- Nearly 30 years of experience working in digital with a focus on user experience.
- Extensive experience in user research and testing.
- Worked with mom-and-pop to enterprise companies in a range of sectors.
- Clients include Shopify, PUMA, the UK Government, and UNICEF.



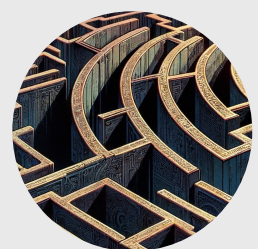
Section 01

Principles of Lean User Research
and Testing



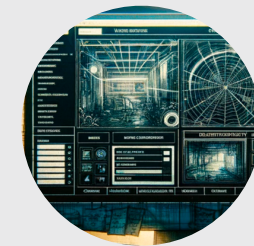
Section 02

Doing Upfront User Research



Section 03

Planning Your Information
Architecture



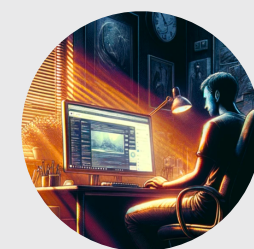
Section 04

Testing Your Design Concepts



Section 05

Testing Your Prototypes



Section 06

Testing Existing Websites or
Apps



Not best practice!

This workshop is for those struggling to implement user research and testing in their organization. It does not represent best practice in the field but rather a starting point that can be built upon.

**Do what you can.
Something is better
than nothing.**

01

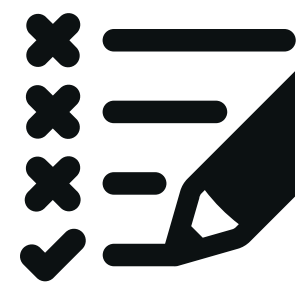
Principles of Lean User Research and Testing

This section will help you establish user research and testing within your organization.

The case for user research and testing

User research and testing provide valuable benefits to both you, your stakeholders, and the organization at large.

The benefits for you



Be proved right

Testing and research are effective methods of justifying your approach to stakeholders.



Deal with bad ideas

Avoid confrontation by suggesting that you test a stakeholder's terrible idea.



Avoid criticism later

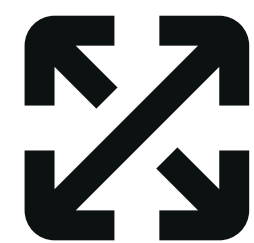
Protect yourself against blame if a project fails with a paper trail of testing and research.

Organizational benefits



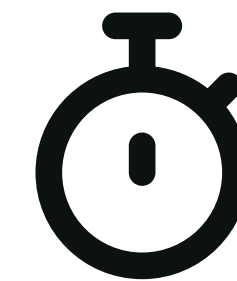
Risk management

Research and testing reduce the chances of a project failing or going over budget.



Market fit

Research and testing increase the chance the service will succeed in the marketplace.



Speed to market

Research and testing reduce debate and time wasted on failed approaches.

Appealing to stakeholders



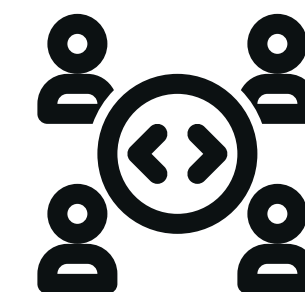
Finance Team

Research and testing reduce the chances of a project failing or going over budget.



Sales and Marketing

Research and testing increase the chance the service will succeed in the marketplace.



Development

Research and testing will streamline development and reduce wasted effort.

Proving the value

- **Start small and grow.** Carry out small tests that show the value of user testing without delays or expense. Grow from that gradually over time.
- **Involve stakeholders.** Invite stakeholders to watch usability testing or provide them with summaries of any testing done.
- **Communicate successes.** Make sure you put effort into promoting the benefits your research and testing have provided through success stories. Try to associate dollar values when you can.

Dealing with resistance

People tend to be resistant to change. As a result, you will probably meet resistance when attempting to integrate research and testing into your working practices.

We cannot get access to our audience



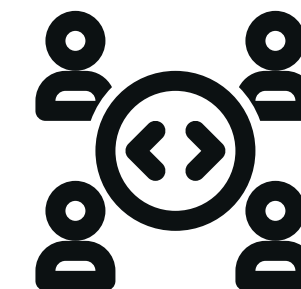
Use existing assets

Make use of data, anecdotes, online comments, and feedback relating to your audience.



Use surrogates

Engage with people similar to your target audience.



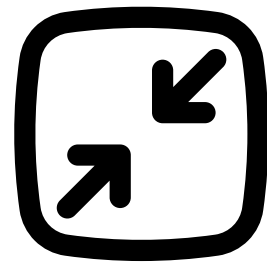
Work with colleagues

Work with customer-facing staff who work with the audience regularly.

You haven't spoken to enough people

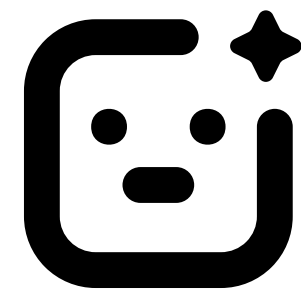
Acknowledge that speaking to more people would be better and that you would happily do so, given the time and budget. However, emphasize that speaking to even a small number is better than making assumptions and guessing.

Your results are biased



Minimize bias

You can minimize some bias by carefully parsing questions. Asking AI can prove helpful.



Be aware

Being aware of the limitations in your research helps offset the impact of bias.



Go more in-depth

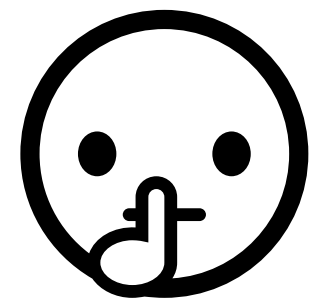
If people believe your results are more biased, recommend more in-depth research.

It will be disruptive and take too long



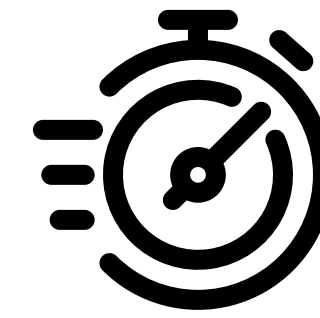
Just do it!

Don't give people the opportunity to say no. Just do it as part of your working practices.



Don't ask

When you start, avoid asking for anything to allow you to do research and testing.



No extra time

Keep your research from impacting the timeline of the project. Build around it.

Finding the opportunity

Avoid trying to persuade others to allow you to do testing. Instead, take opportunities to covertly integrate research into projects with minimal impact.

Use every tiny moment

- **Use tests that take less than an hour.** Many research techniques can take less than 30 minutes to set up. These include first-click tests, 5-second tests, eye-tracking simulations, and more.
- **Focus on fast results.** Focus on tests that use services that can get you results back in a matter of a couple of hours. For example, [Pollfish](#) can get surveys answered in minutes.
- **Use natural breaks in projects.** From waiting for feedback to the delivery of content there are natural breaks in projects that can be used to run quick tests.

Manufacturing excuses



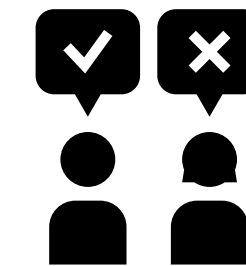
Preparing to present

When you have been asked to present a design that is a great excuse for a bit of research.



Answering questions

A question can give you an excuse to do a bit of research to provide the answer.



Exploring options

When people cannot agree on an approach, research can be a way to break the tie.



Hide the cost

Never include research and testing as a line item in an estimate unless you work with a user-centric organization. It will always be the first thing cut to reduce costs.

**Do what you can.
Something is better than
nothing.**

When to do research or testing

When your time and budget are limited, picking the most appropriate moments to carry out user research is crucial.

Avoid testing and research for the sake of it.

We have a tendency to carry out user research because that is what you are meant to do, without a clear reason as to why.

Don't do a comprehensive discovery phase without a clear idea of what you want to discover.

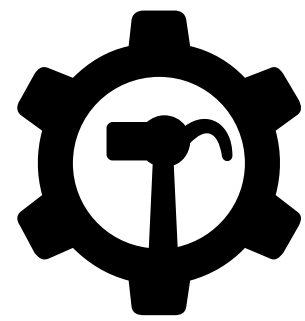
General background research does not provide the best return for the time and money involved.

Answer unanswered questions

- Who are my audiences?
- What are their top tasks?
- What are the user's goals?
- Is previous research still valid?
- Will users spot this element?
- Will the design generate the proper reaction from users?
- Do users understand the content?
- Can users find answers to their questions?
- Will users become frustrated?

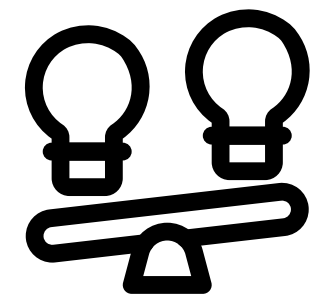
**You won't necessarily
know the right
questions to ask
upfront.**

Resolve disagreements



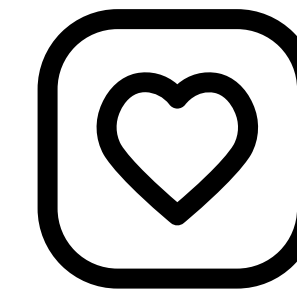
Does it work?

It is not common for stakeholders to suggest your approach won't work in practice.



Which is better?

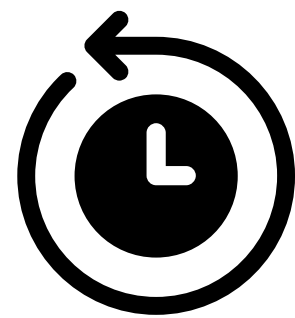
Stakeholders often feel they have better solutions to a design problem and want to use that.



Will users like it?

A stakeholder may not personally like your approach and believe users will feel the same.

Inappropriate information



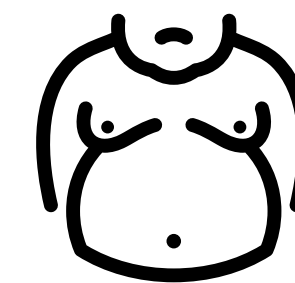
Out of date

Sometimes you will find yourself working with data or personas that are out of date.



Biased

It is not uncommon to be presented with survey results where the questions are biased.



Unfit for purpose

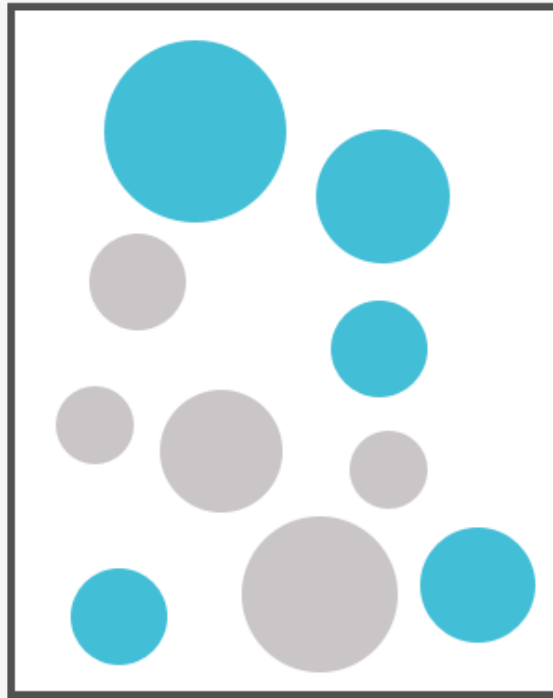
Sometimes you will be presented with personas produced by marketing that don't work for UX.

Test early, test often

Although your testing can be incredibly lightweight, it is essential that you test early in the project and that you carry out multiple rounds of testing.

One test with 8 users

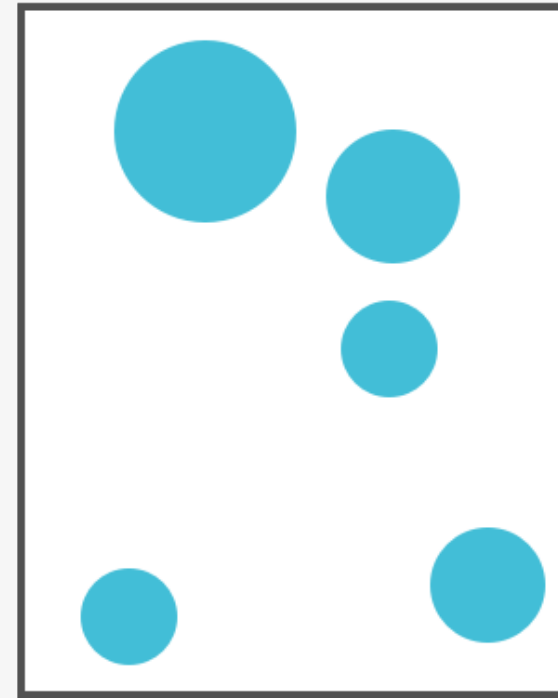
8 USERS



Eight users may find more problems in a single test.

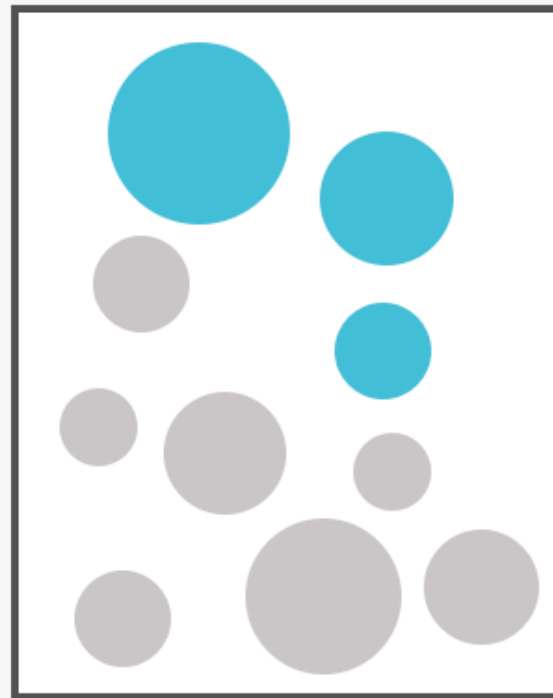
But the worst problems will usually keep them from getting far enough to encounter other issues.

Finds only 5 problems



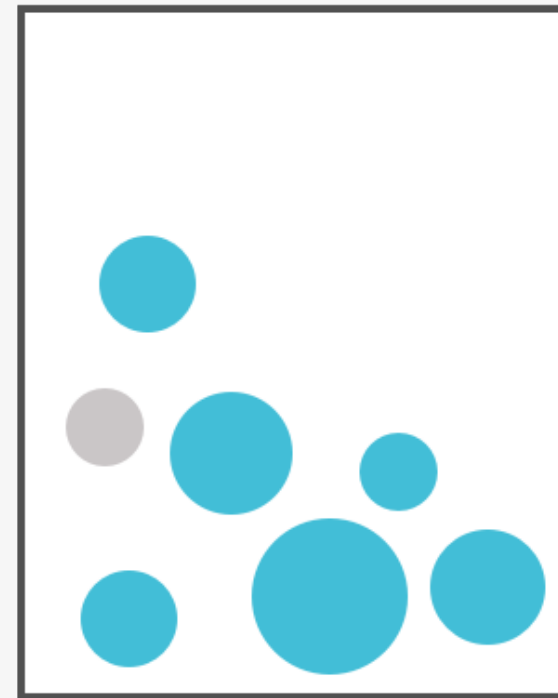
Two tests with 3 users

First test: 3 Users



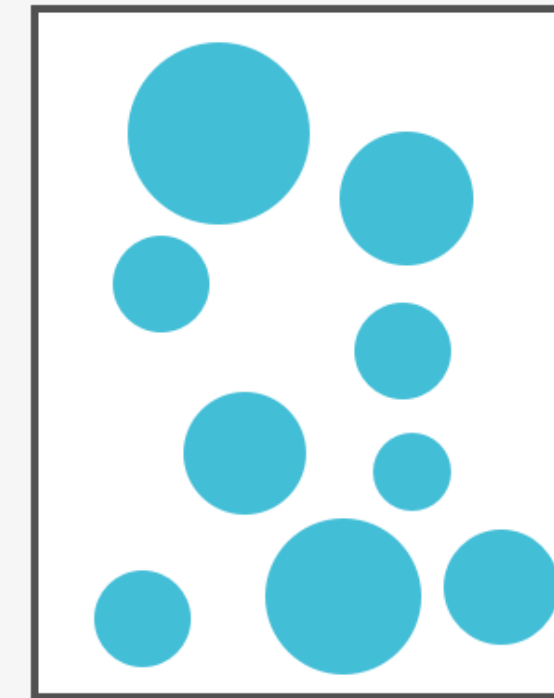
Three users may not find as many problems in a single test.

Second test: 3 Users



But in the second test, with the first set of problems fixed, they'll find problems that couldn't have been seen in the first test.

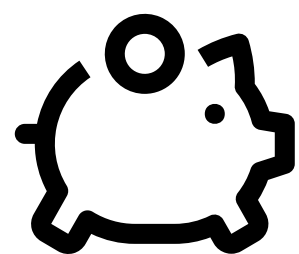
Finds 9 problems.



Test lightweight but often

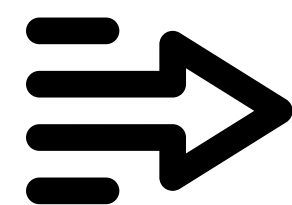
Testing often doesn't just catch more issues, it also hides the 'cost.'

Test early



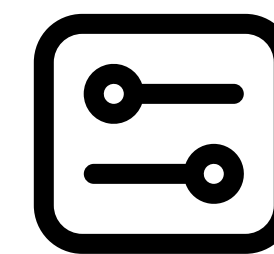
Cheaper to fix

The earlier you identify a problem the easier and cheaper it will be to fix the issue.



Faster to market

Fixing problems earlier is faster, enabling you to deliver the final service quicker.



Easier to adjust

It is easier to pivot and adjust based on feedback early when the sunk cost is low.

Questions to answer while designing

- Do they get it?
- Do they know how to navigate?
- Can they see it?
- Do they like it?

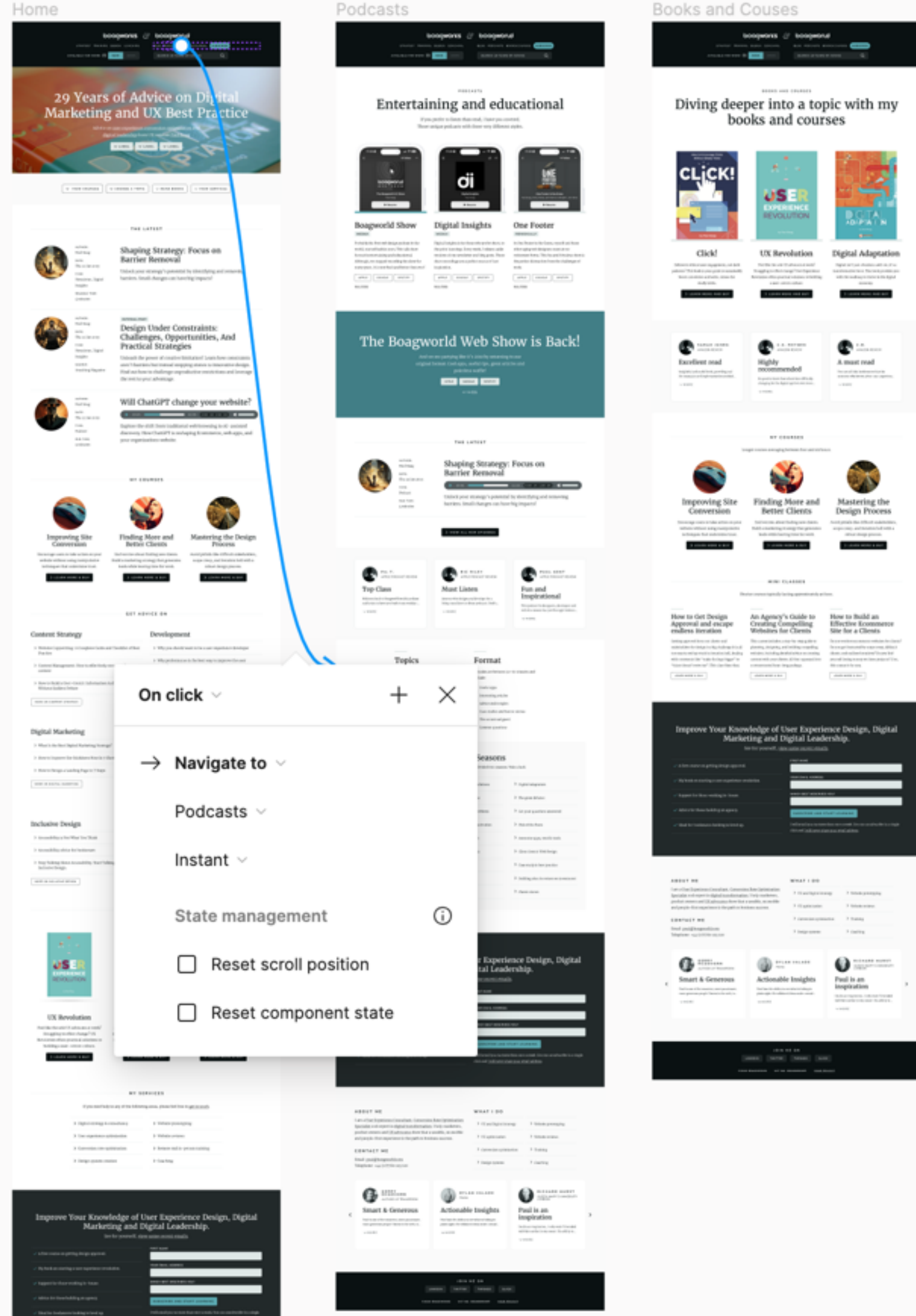
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Questions to answer during the build

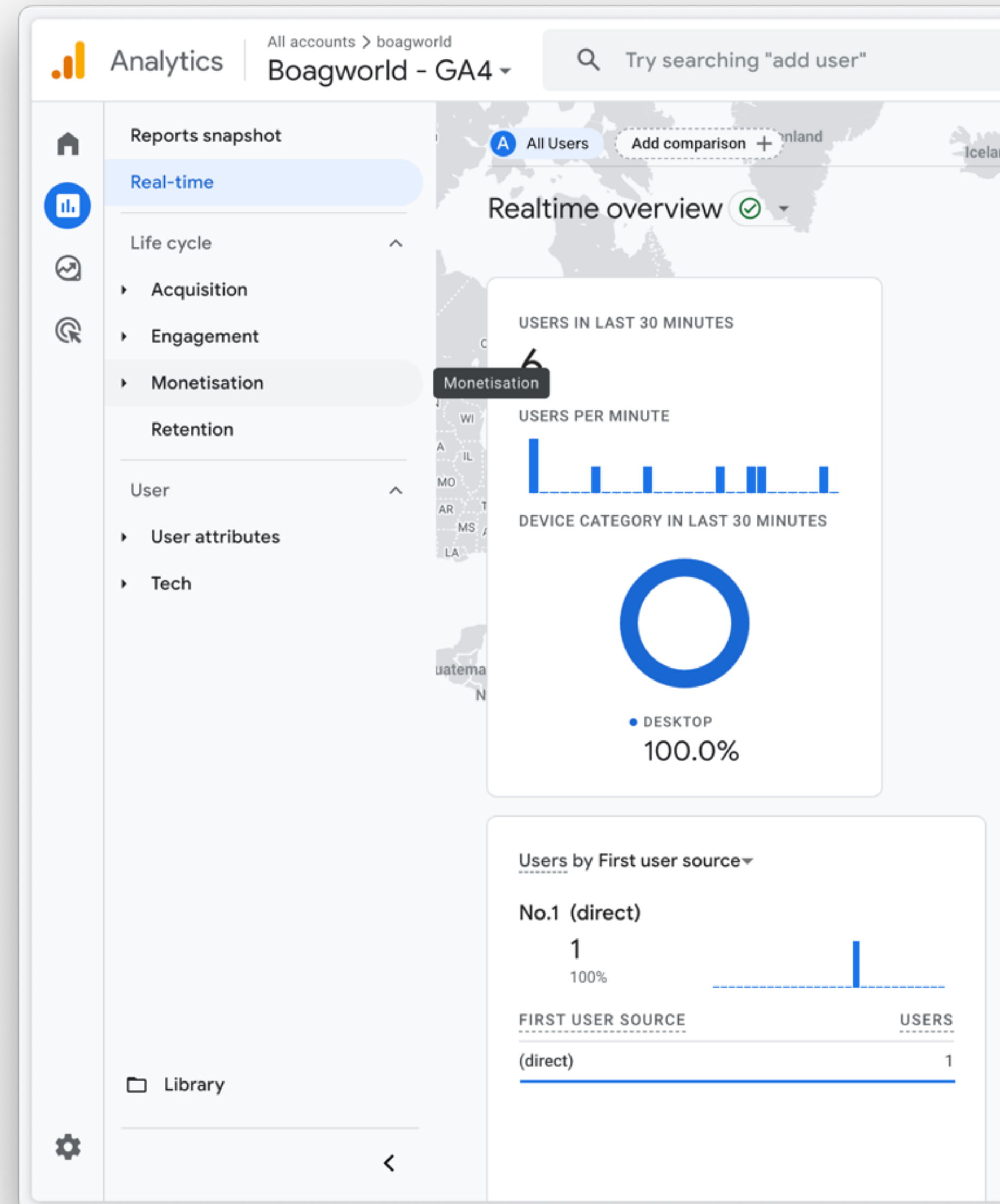
- Can they find it?
- Does it answer their questions?
- Can they use it?

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Questions to ask post-launch

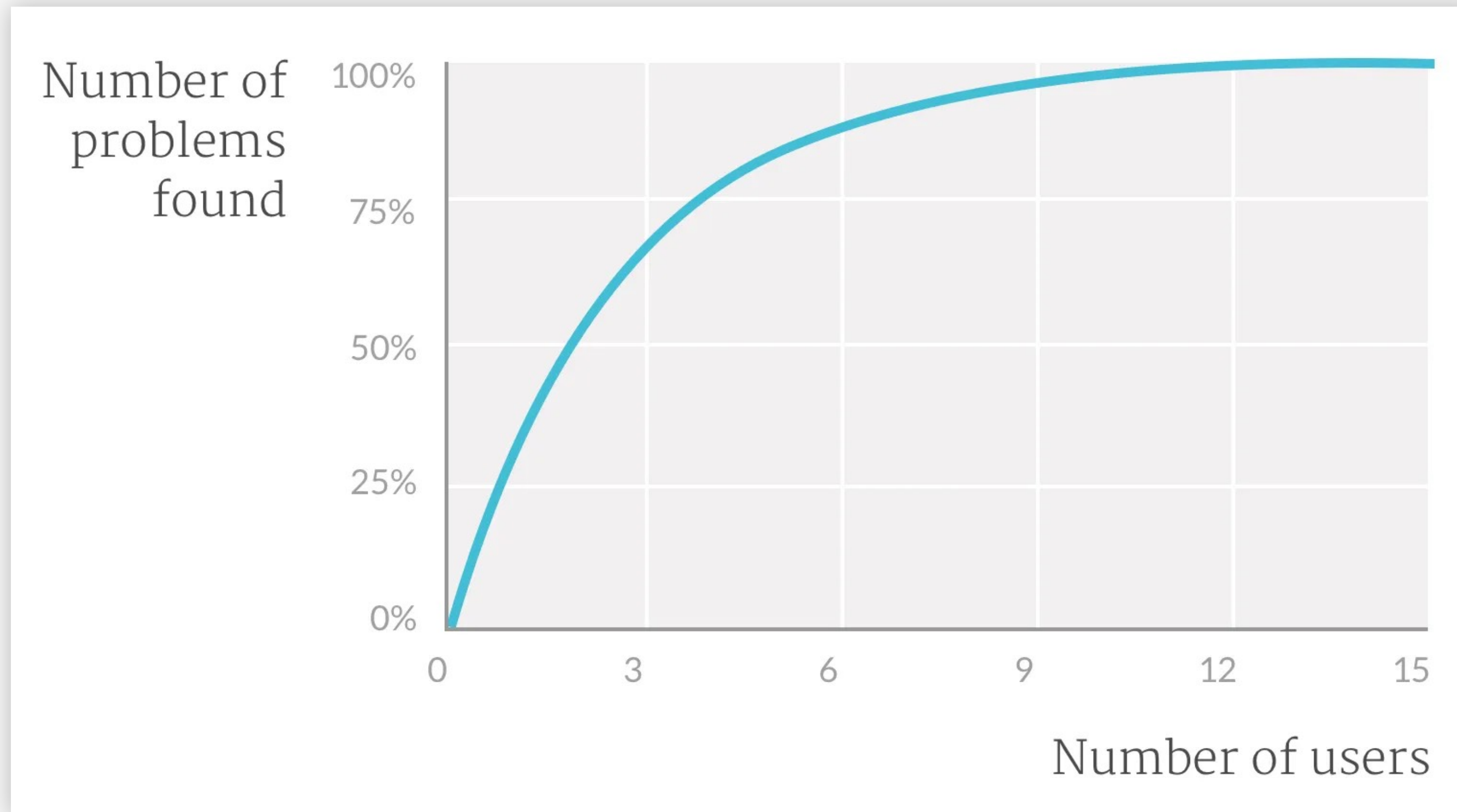
- Where do people drop out?
- What is stopping people completing their task?
- How can we increase conversion?
- What will work better?



Finding user research participants

One of the biggest perceived challenges is finding user research participants. However, it is not as complicated as you think.

When testing usability



- Little point in testing with more than six people.
- Even three people will catch 75% of the problems.
- You can test with anybody with comparable ability.

But they won't understand our content

Any content we publish online should be made accessible to the widest possible audience. Keeping it easy to understand helps those:

- New to the sector.
- English isn't their first language.
- They have cognitive disabilities.

It also helps everybody process information faster.

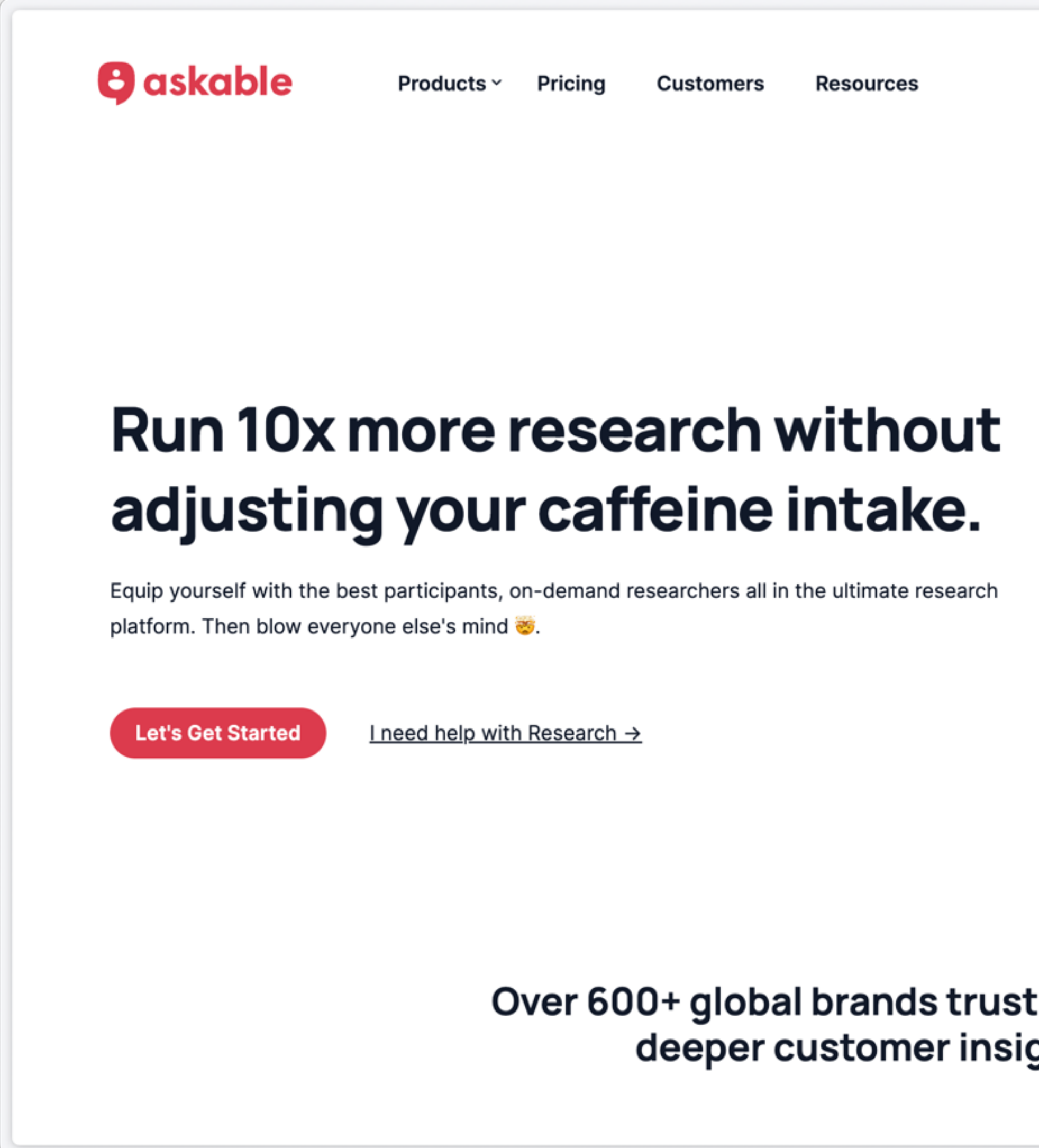
Testing aesthetics

Testing how people feel about your design aesthetics is harder. You will need to closely **represent** your audience and test with **more people**.

- Culture
- Social group
- Psychology
- Personal experiences
- Trends
- Socioeconomic factors

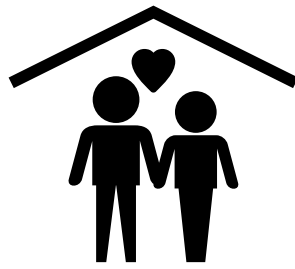
Using recruitment services

- Many testing tools will recruit participants for you for as little as a \$1 per person.
- Askable will recruit users without tying you to use a particular platform.



The screenshot shows the Askable website homepage. At the top left is the Askable logo, followed by navigation links for Products, Pricing, Customers, and Resources. The main headline reads "Run 10x more research without adjusting your caffeine intake." Below this is a sub-headline: "Equip yourself with the best participants, on-demand researchers all in the ultimate research platform. Then blow everyone else's mind 🤖." There are two buttons: a red "Let's Get Started" button and a blue "I need help with Research" button with a right-pointing arrow. At the bottom right, there is a statistic: "Over 600+ global brands trust deeper customer insight".

Should you use internal testers?



Friends and family

Anybody outside of the organization is normally preferable to using employees.



User adjacent

If you use employees, favor those who work regularly with end users.



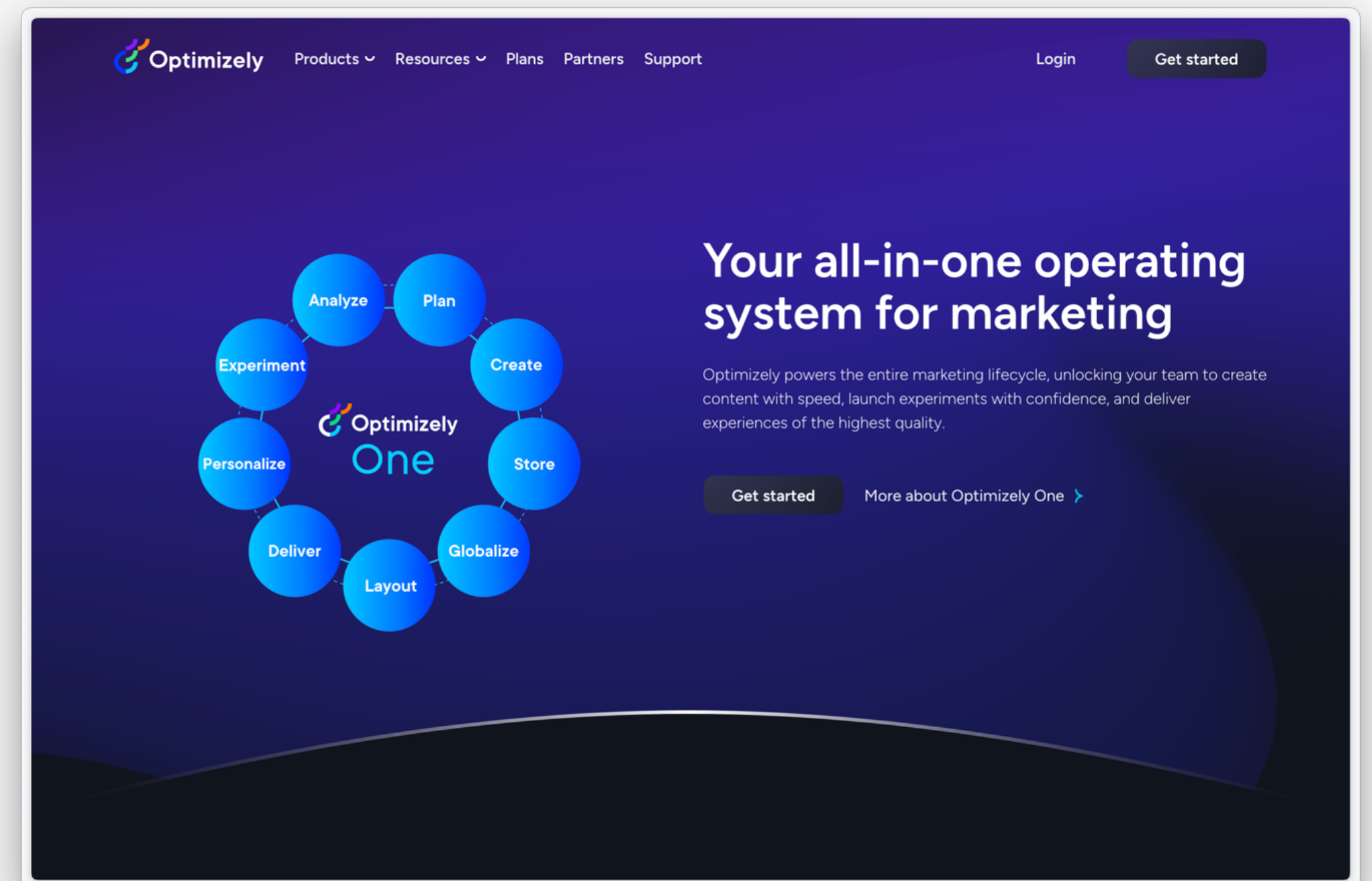
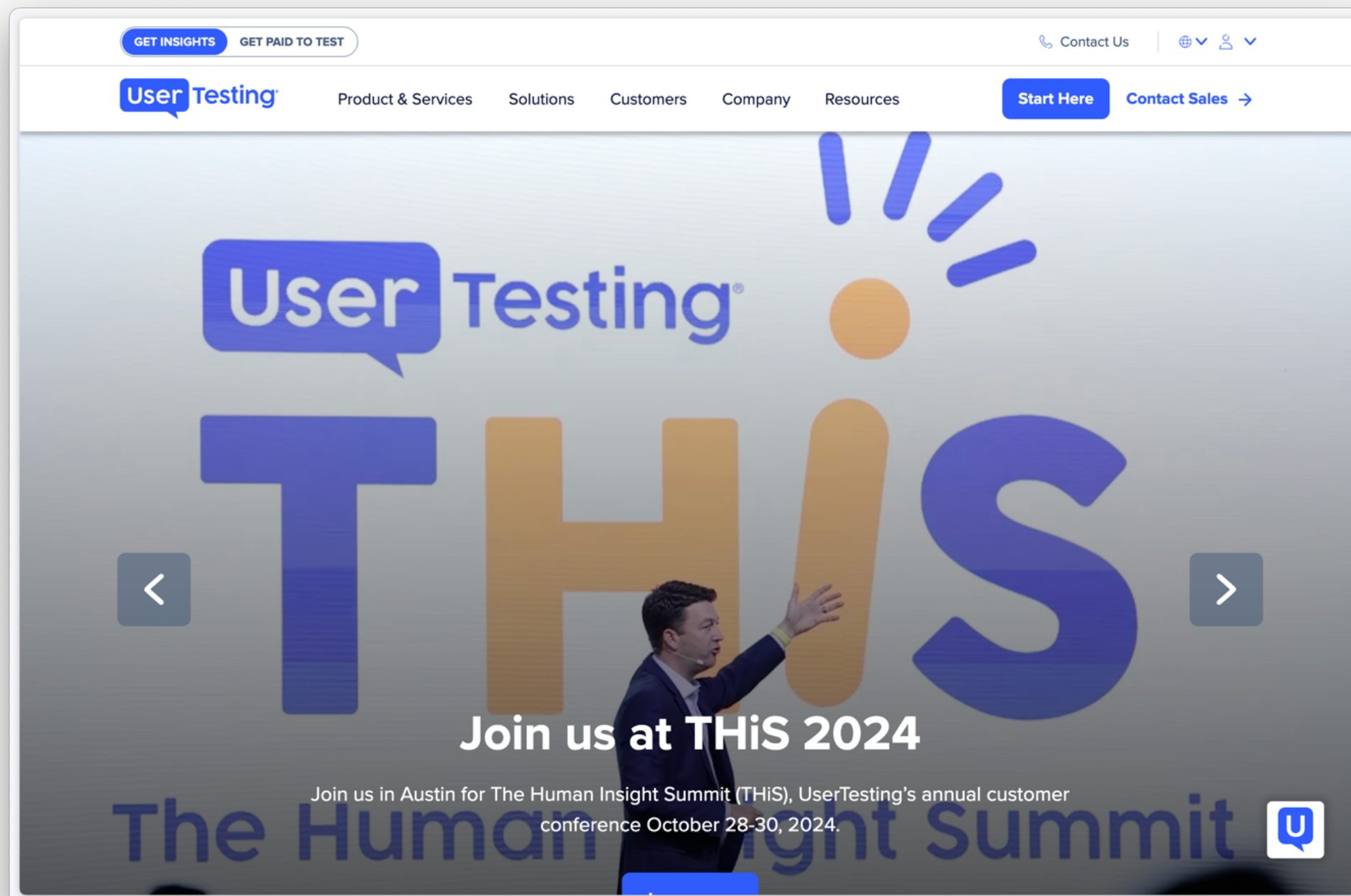
Beware bias

Recognize that internal testers will have a deeper understanding of the offering than users.

Be smart about your tools

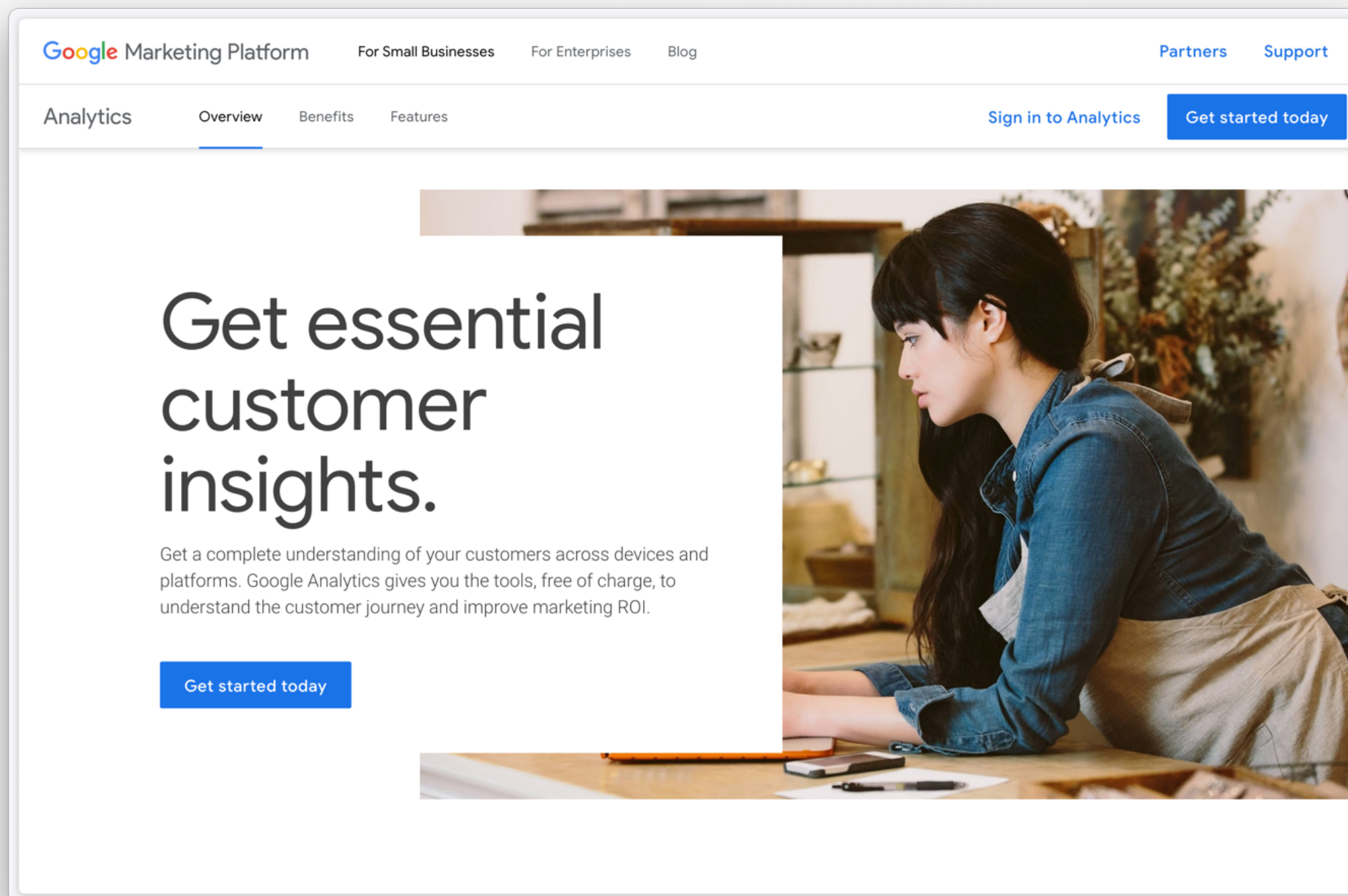
When starting out on your user research journey, it is unwise to ask for a big investment in tools.

Avoid enterprise platforms

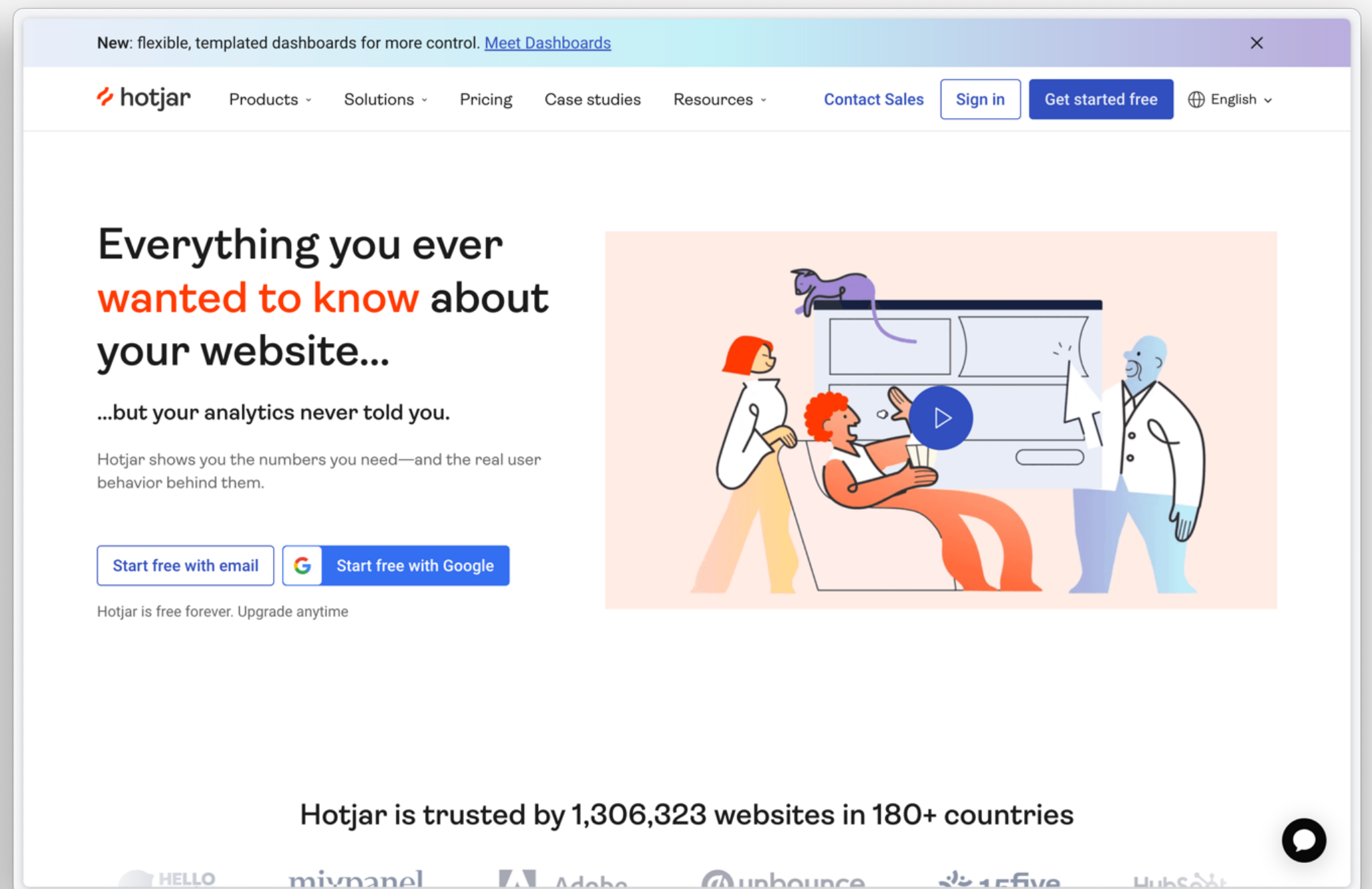


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Use the tools you have



The screenshot shows the Google Marketing Platform website for Google Analytics. The navigation bar includes "Google Marketing Platform", "For Small Businesses", "For Enterprises", "Blog", "Partners", and "Support". The main navigation has "Analytics", "Overview", "Benefits", and "Features". A "Sign in to Analytics" link and a "Get started today" button are visible. The main content area features a large image of a woman in a denim shirt and apron working at a counter. Overlaid on the image is a white box with the text "Get essential customer insights." and a sub-headline "Get a complete understanding of your customers across devices and platforms. Google Analytics gives you the tools, free of charge, to understand the customer journey and improve marketing ROI." Below this is another "Get started today" button.



The screenshot shows the Hotjar website. The navigation bar includes "New: flexible, templated dashboards for more control. Meet Dashboards", "hotjar", "Products", "Solutions", "Pricing", "Case studies", "Resources", "Contact Sales", "Sign in", "Get started free", and "English". The main content area features the headline "Everything you ever wanted to know about your website..." and a sub-headline "...but your analytics never told you." Below this is a paragraph: "Hotjar shows you the numbers you need—and the real user behavior behind them." There are two buttons: "Start free with email" and "Start free with Google". Below these is the text "Hotjar is free forever. Upgrade anytime". To the right is an illustration of three people looking at a screen with a play button. At the bottom, it says "Hotjar is trusted by 1,306,323 websites in 180+ countries" and lists logos for HELLO, mixpanel, Adobe, @unbounce, 15five, and HubSpot.

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Make use of free tools

The screenshot shows the Microsoft Clarity website homepage. At the top, there is a navigation bar with the Microsoft logo, the word "Clarity", and links for "Products", "Pricing", "Resources", "English (US)", "Sign in", and "Sign up". The main content area features the headline "Understand your users. Improve your products. Better your business." followed by a sub-headline "Clarity is a free tool that captures how people use your site. Setup is easy and you'll start getting data in minutes." Below this, there are three checkmarks: "GDPR & CCPA ready", "No sampling", and "Built on open source". Two buttons, "Get started" and "See live demo", are positioned below the checkmarks. To the right, there is a large 3D illustration of a computer monitor displaying a heatmap and a tablet displaying a donut chart. At the bottom of the main content area, there is a navigation menu with "Heatmaps", "Session recordings", "Insights", and "Google Analytics". The "Heatmaps" option is currently selected. Below the menu, there is a text block: "Generate automatically for all your pages. See where people click, what they ignore, and how far they scroll." and a button labeled "Learn about heatmaps".

Microsoft | Clarity

Products Pricing Resources | English (US) Sign in Sign up

Understand your users. Improve your products.
Better your business.

Clarity is a free tool that captures how people use your site. Setup is easy and you'll start getting data in minutes.

✓ GDPR & CCPA ready ✓ No sampling ✓ Built on open source

Get started See live demo

4.8 out of 5 4.5 out of 5

Heatmaps Session recordings Insights Google Analytics

Generate automatically for all your pages. See where people click, what they ignore, and how far they scroll.

Learn about heatmaps

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Start with free plans

- [Lyssna](#). Great for quick tests, such as first-click and 5-second tests.
- [Maze](#). A good all-round platform for a variety of usability testing.
- [UX Metrics](#). The perfect tool for card sorting and tree testing.
- [Lookback](#). My preferred platform for facilitated usability testing. (Not free, but close!)
- [Pollfish](#). A great platform for running surveys.

Free

\$0 USD / month

For small teams starting their experience research journey.

Sign up for free

No credit card required

Plan limits

Unlimited tests, surveys, and interview studies

3 seats included

3 seats maximum limit

2 min length for tests and surveys

15 self-recruited test and survey responses viewable

5 GB storage

5 transcript hrs

5 self-recruited interview sessions/month

Unlimited recruitment from our panel

Additional features

Interview screeners

Conclusion

Getting started in user research doesn't have to be time-consuming or expensive.

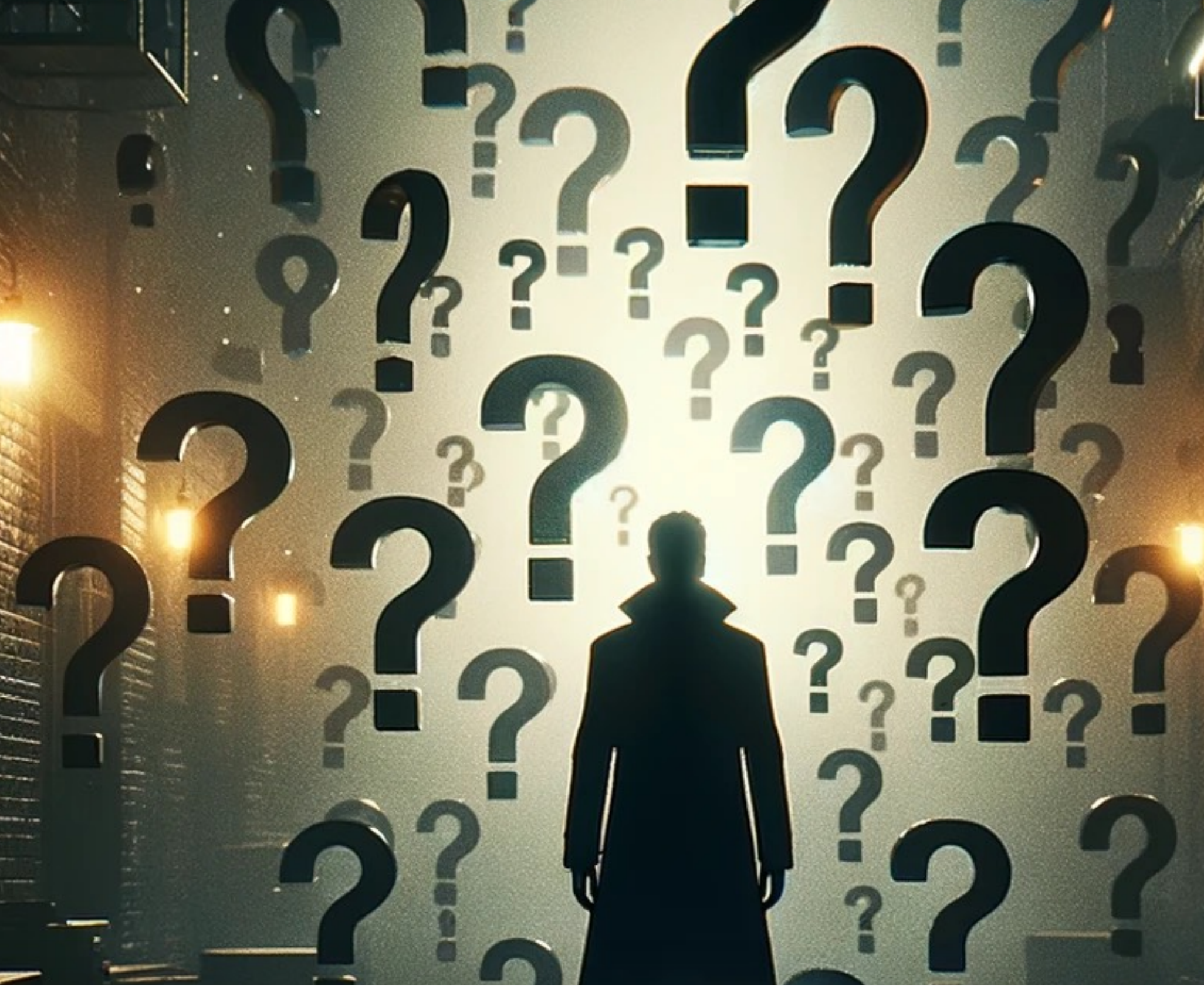
Don't wait for permission, just start.

You can achieve a lot without needing a budget or asking for extra time.



Next

Doing Upfront User Research



Doing Upfront User Research

If you can, spending time at the project's outset doing user research can prove valuable later.

How to approach upfront research

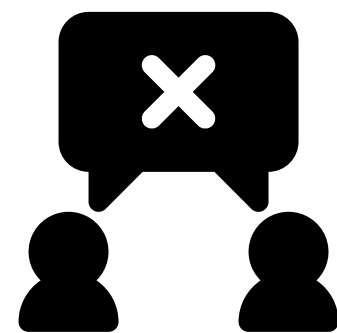
Considering the constraints of time and budget we will probably face, it is important to have a clear plan for addressing any initial research we do.

Why not skip upfront research?



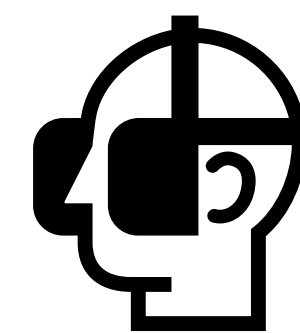
Confusion

Without user research, there will be assumptions and misunderstandings that will cause chaos later.



Disagreement

Different stakeholders will disagree over the approach, leading to iteration hell.



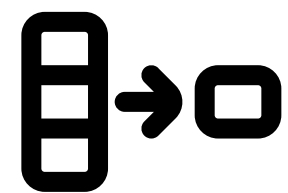
No context

You won't understand the context within which the project is happening, leading to poor solutions.

The minimum you need to know

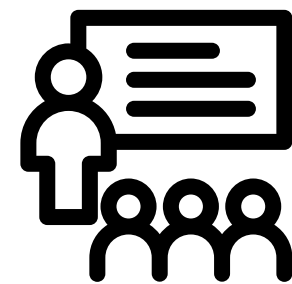
- **Who is your audience?** Having a clear picture of who you are designing for that all stakeholders agree with is crucial for success.
- **What are their needs?** You need to know what users want to achieve and how they want to achieve it.
- **What is their overall experience?** At least some sense of what has brought users to this point and what they will do next is helpful.
- **Where are they encountering friction?** If there is an existing experience, it is essential to know how it is failing users.

But, keep it lightweight



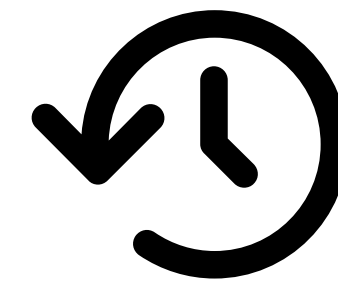
Consolidate

There is often existing research or information available that can save you time.



Workshop

A single workshop can be enough to give you the basics to get started.



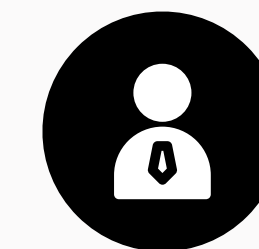
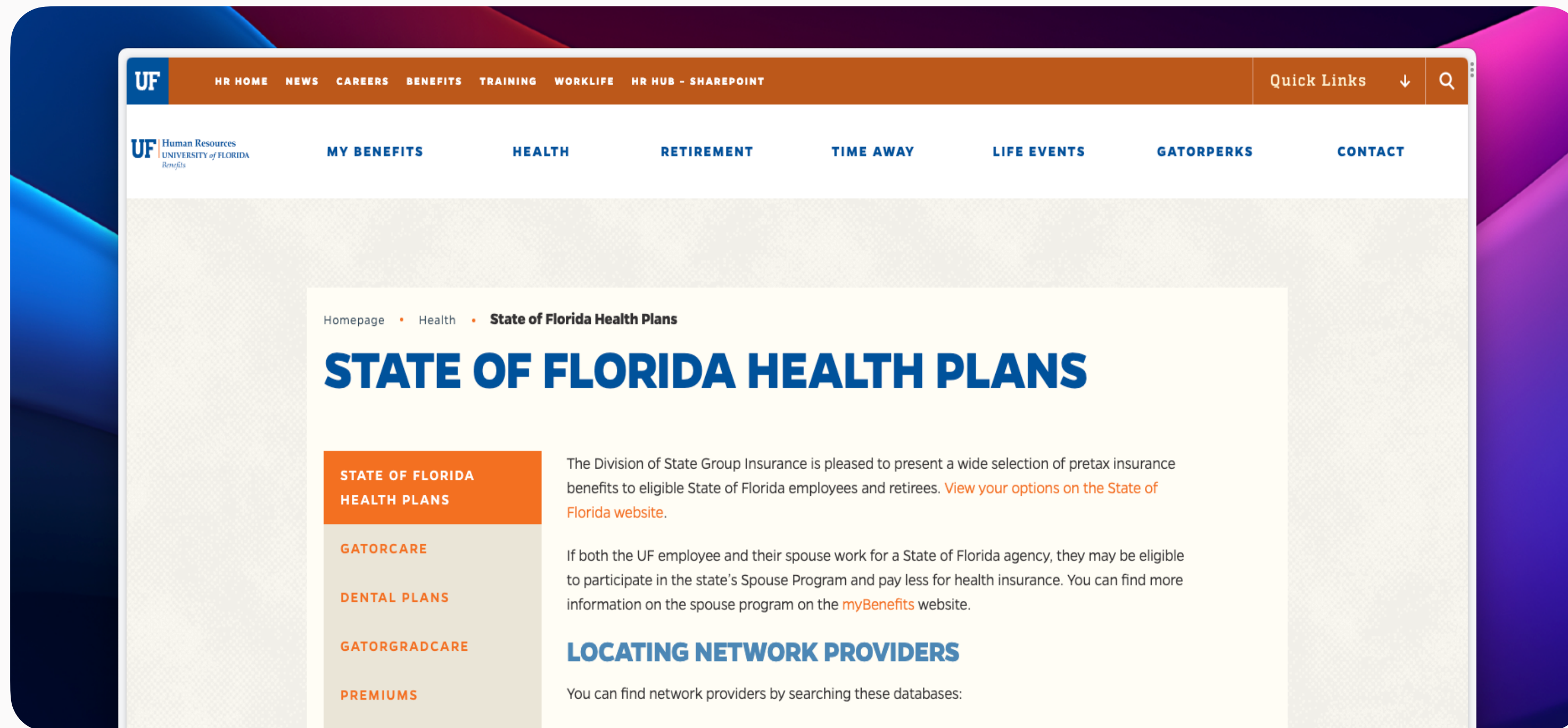
Do more later

There is nothing stopping you doing more research later as questions emerge.

Identifying your audiences

Step one is always to work out who your audiences are and how you would like to think about them.

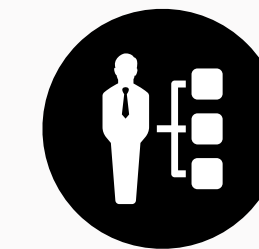
You cannot serve everybody equally



Existing Employee



New Employee



HR Managers



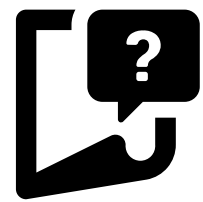
Joiners/Switchers

DOING UPFRONT USER RESEARCH / IDENTIFYING YOUR AUDIENCES

Prioritizing your audiences

- **Business Alignment.** Prioritize groups directly contributing to key metrics such as revenue, market share, or strategic growth areas.
- **User Impact.** Groups whose needs, if met, would significantly enhance overall user satisfaction and engagement should be prioritized.
- **Needs.** Prioritize user groups with the most acute pain points, especially if these are barriers to project goals.
- **Growth potential.** Larger or rapidly growing segments may offer more value in the long term, justifying their prioritization.
- **Regulatory requirements.** Legal and regulatory requirements might influence which user groups need to be prioritized.
- **Feasibility.** Consider the practical aspects of reaching and engaging each user group.

Why segment your audience?



Different Questions

Different audiences have different **questions**, so segment your audience using groups with similar questions.



Different Tasks

Different audiences also want to do different kinds of **tasks**, so segment by those as well.



Different needs

Some users have specific needs to comprehend content due to language or cognitive requirements.

 **WARNING!**

Be careful using demographics

There is a temptation to focus on demographics when segmenting audiences as you would in marketing. However, demographic groups are not as important as use cases.

Segment based on needs

Prospective employees

They want an overview of the healthcare options available to employees.

New Employee

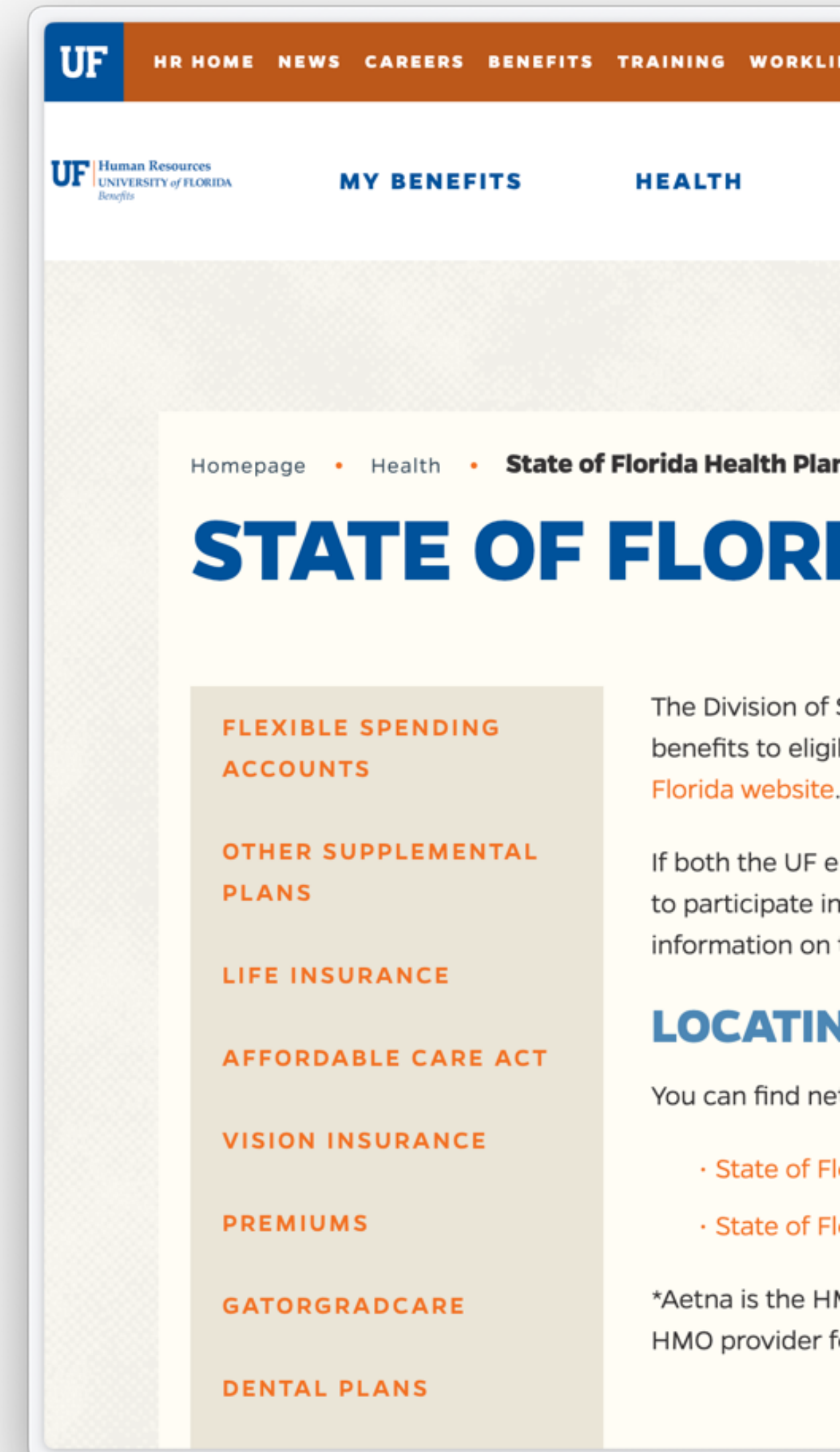
They need to know how to pick and enroll on a healthcare plan.

Existing Employee

They want to know how to switch health insurance packages.

Managers

They need to know how to approve healthcare plans and support staff in choices.



Understanding user needs

Once you know your audiences, the next step is understanding their needs and what drives them.

What is useful to know

PRIMARY

- **Questions.** What questions is the user seeking to answer?
- **Objections.** What might cause them not to act, or to abandon the experience?
- **Goal.** What is it they are ultimately trying to achieve?
- **Tasks.** What actions do they need to take to achieve their goal?

SECONDARY

- **State of mind.** How are using feeling during the experience?
- **Influence.** What is influencing the experience the user is having?
- **Challenges.** What pain points are the users facing during the experience?
- **Touchpoints.** What different ways are users interacting during the experience?

Consolidate what you know

Existing User Research

Site Analytics

Search Terms

Existing Service Testing

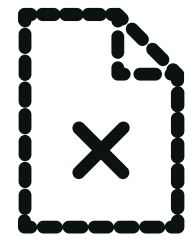
Social Media Team

Personas

Customer Facing Staff

CRM Data

Identify the gaps



**Missing
Information**



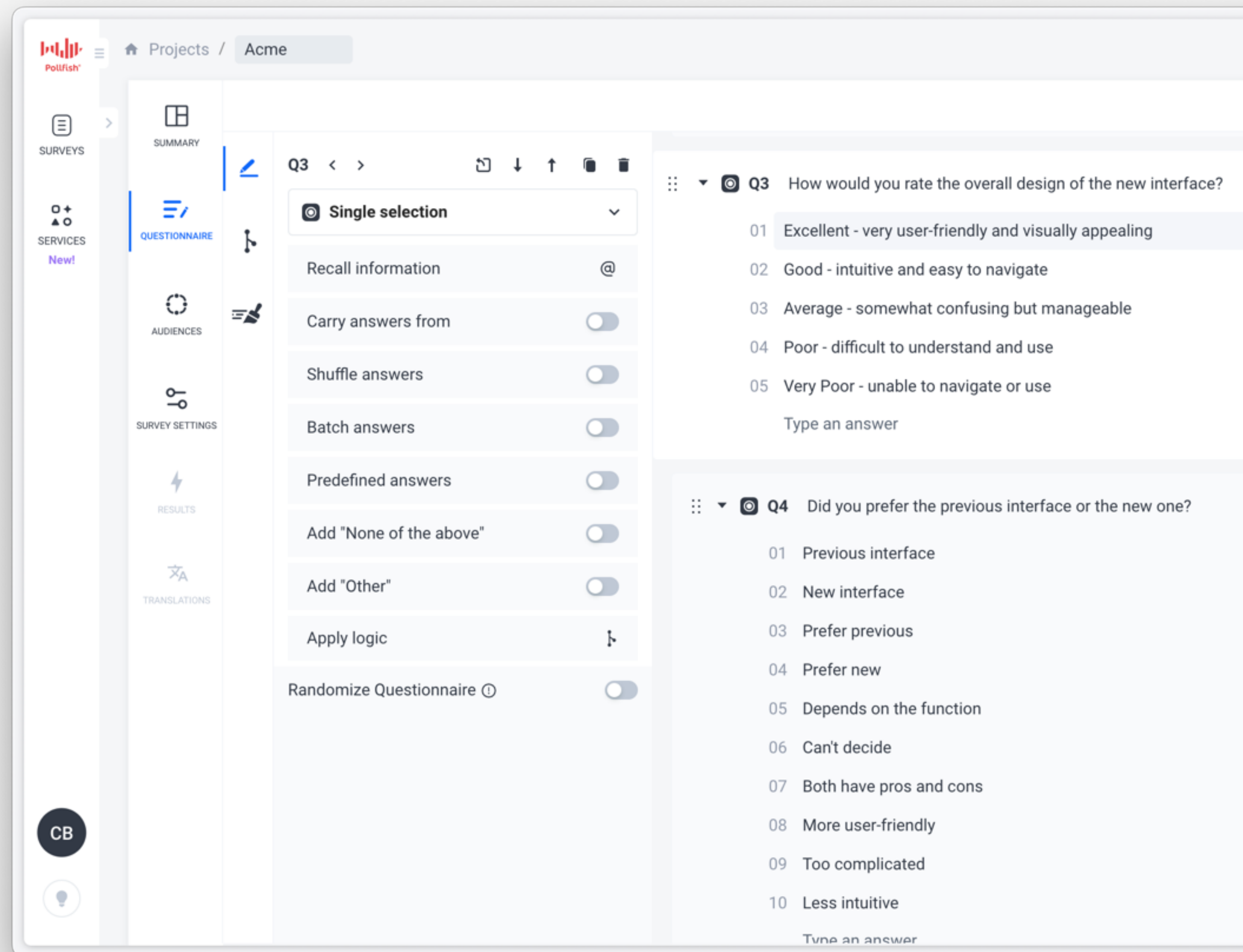
**Out of Date
Information**



**Suspect
Information**

Fill the gaps with surveys

Surveys are excellent when you identify specific information you want to know or check.



How to run a good survey

- **Keep it short.** People abandon longer surveys, and colleagues love to add questions to them.
- **Ask actionable questions.** Ask yourself what you can do with the answer you get from a question. If you can't act on it, don't ask the question.
- **Favor closed questions.** Reviewing answers to open-ended questions can be time-consuming, although AI can help.
- **Check your wording.** It is easy to bias a survey with a poor choice of words. Use AI to ensure your questions are neutral.

Barriers to Surveying



Data Protection

I recommend keeping surveys anonymous to avoid getting delayed by compliance issues.



Survey Fatigue

Ask people to opt-in to a user research group to avoid sending multiple requests.

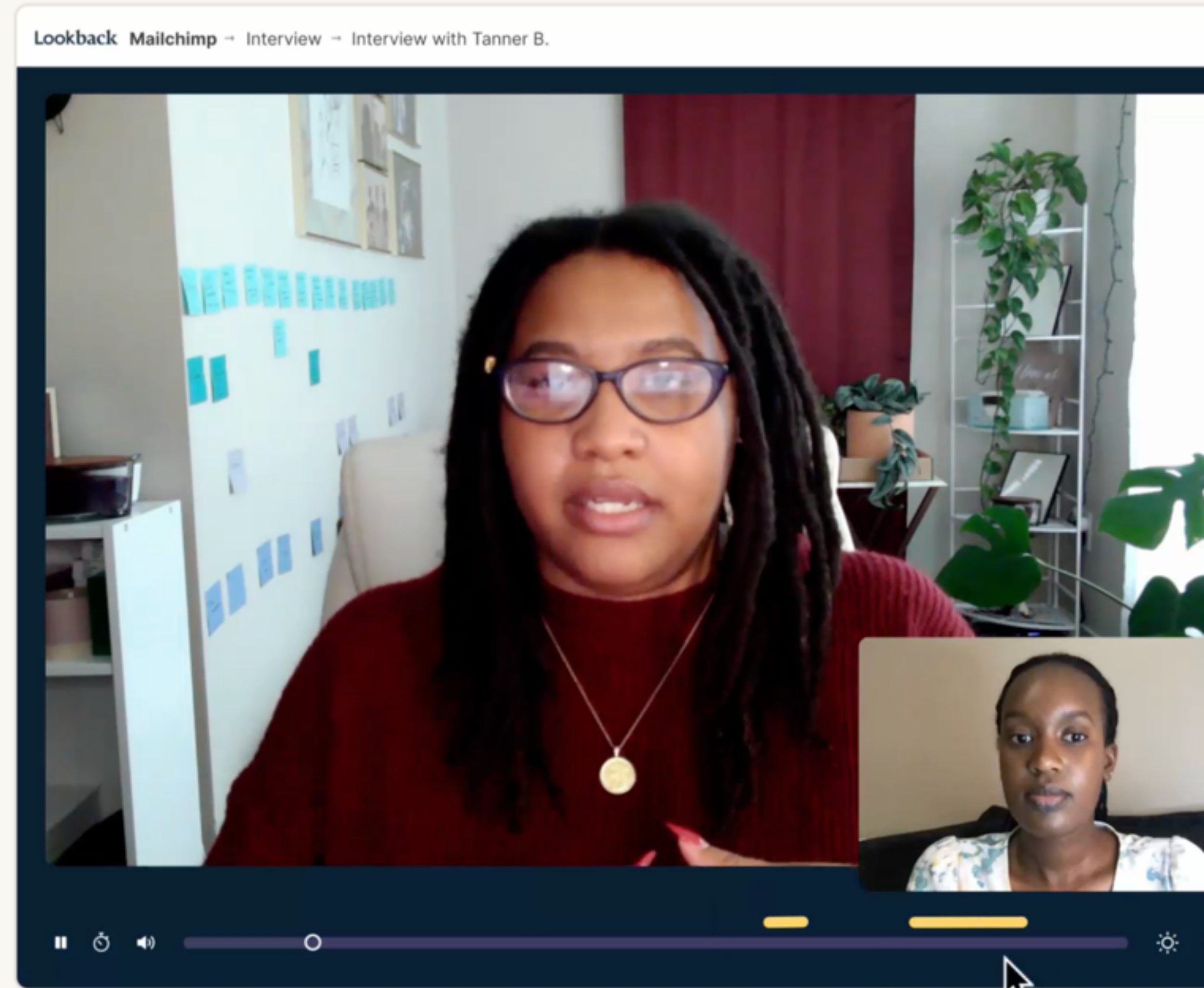


Poor Participation

Consider using a platform like [PollFish](#), which will recruit participants for you.

Fill the gaps with interviews

User interviews can be a luxury, but they are an excellent way of connecting with your audience and making it easier to empathize.



How to run interviews

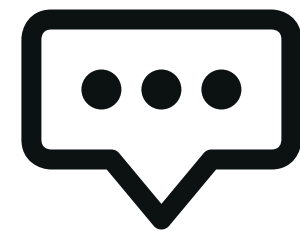
- **Identify topics and starter questions.** Identify the topics you wish to discuss and have some questions, but try to remain flexible.
- **Build Rapport.** Begin your interviews with light, non-threatening questions to make participants feel comfortable.
- **Listen more, talk less.** Encourage participants to do most of the talking, and resist the urge to fill silences with your thoughts or leading questions.
- **Ask follow-up questions.** Probe deeper into interesting or unexpected answers with follow-up questions. Ask why a lot!

Using your interviews effectively



Quotations

Use quotes from your interviews regularly with stakeholders to keep them focused on user needs.



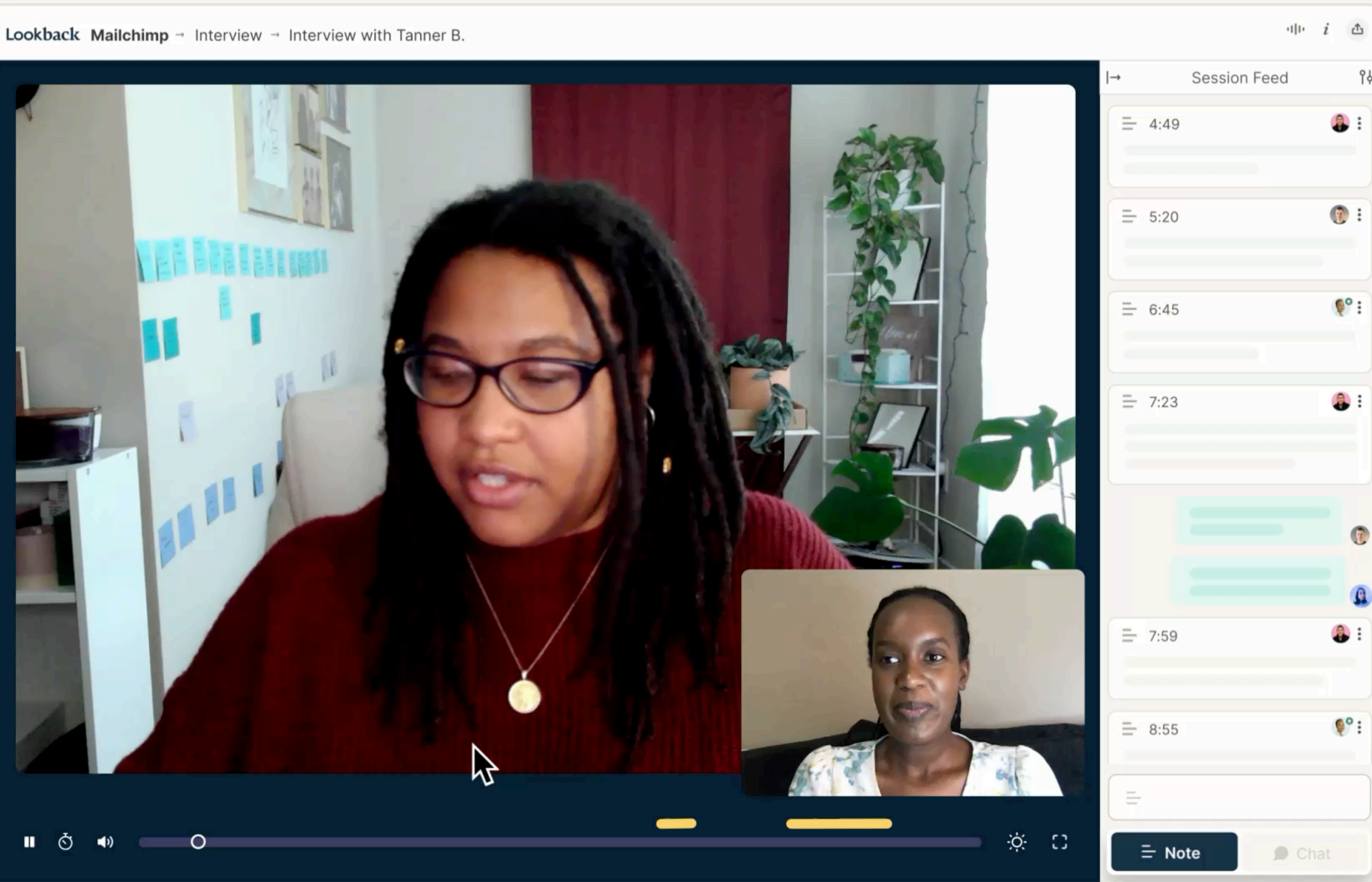
Transcription

Ensure you have a transcription of the sessions, preferably with highlights marked for future reference.



Highlight Reel

If time allows, create an edited video of the best comments to share with stakeholders.



Use the right tool if you can

Zoom, Google Meet, or Teams will do the job, but Lookback will make it much easier to use the interview content.

**Don't worry about 'doing it wrong.'
Your participants won't know!**

Questions to ask

- **Background and context.** Ask about the participants, their pain points, and their goals in using the service.
- **How they use the service.** How do they typically use the service, and what challenges do they encounter?
- **Needs and opportunities.** How satisfied are they with the service, and what areas would they like to see improved?
- **Open-ended feedback.** Always try to end by asking if there is anything you have not covered or if they have final thoughts they would like to share.

Feeling

How is the user feeling about the experience?

Influences

What people, things, or places influence them?

Journey

Where is the user in their experience and what (if any) interactions have they already had?

Goals

What is the users ultimate goal? What are they trying to achieve?

Pain Points

What pain points are the users experiencing that they hope to overcome?

Questions and Tasks

What tasks are users trying to complete? What questions or objections do they need answering?



Name of Person

Mapping users' journeys

Mapping the user journey is not always strictly necessary, but it can be a helpful tool where ambiguity exists about the user experience.

What is journey mapping?

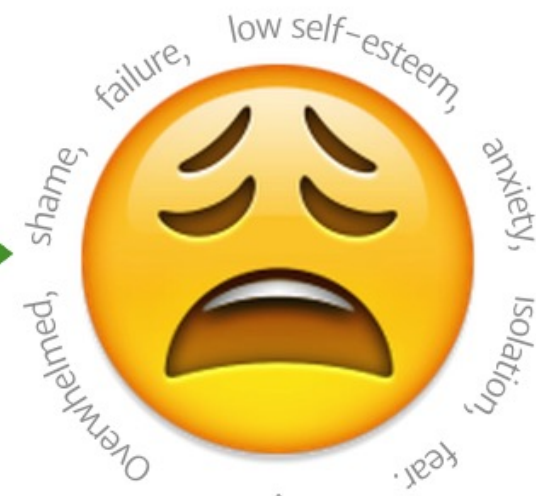
- **A Story.** It is not meant to be 100% accurate. It is based on real insights, but is more of a story of a hypothetical experience.
- **An Archetypical User.** Every user's experience is unique and so each should have their own map. Instead we imagine an archetypical user who has common characteristics.
- **A Simplified Journey.** Real user journeys vary massively and often include many branches and a lot of back and forth. A journey map simplifies this.
- **Insights into the User.** A journey map aims to uncover insights about the customer in much the same way as a persona. The difference is that it shows how those insights change over time.

LIFE EVENTS



What is happening to me? Am I the only one that feels this way? How can I feel better? Am I bad enough to ask for help?

REALISATION



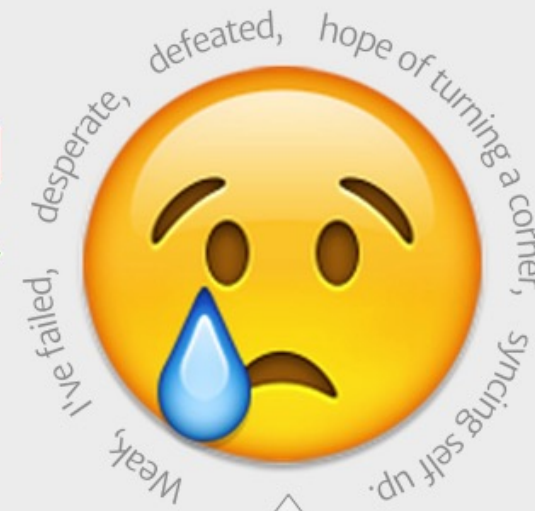
Do I need help? Who can help me? How can they help me? Am I alone? Why is it so hard to cope?

SEEKING HELP



Am I wasting their time? What if it costs money? Which organisation is best for me? Will this feeling just go away? What will happen if I reach out?

MAKING CONTACT



What will happen when I make contact? What if I am not allowed to call? Will this actually help? Will they tell people what I say?

RECEIVING HELP



Can I talk to the same person again? Is the service really anonymous? Are they keeping a record? What do they think of me?

POST HELP



What next? Who else can I turn to? Why was that so frustrating? Why did it take so long for somebody to get back to me?

ACTIONS

Life can be difficult, life events and transitions can be hard.

I can barely make it through the day. I just try and act normal and do my best to deal with my feelings.

I will start by doing some research online. Perhaps I could also talk to friends and family or even go to my GP.

It was a frustrating experience at times but I got there in the end. I am not sure if the Samaritans is right for my generation.

WEAKNESSES

I've heard of the Samaritans. You only call them when you are feeling suicidal.



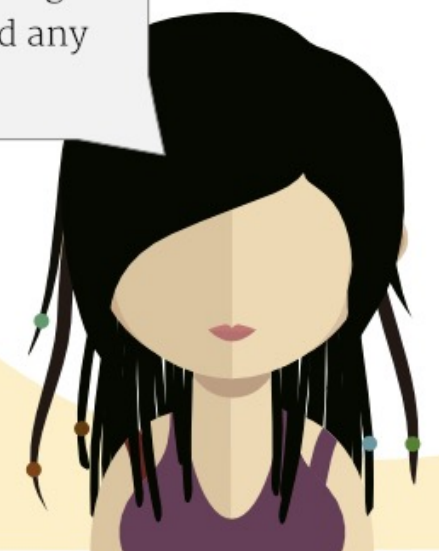
I can't call the Samaritans. I hate speaking to people on the phone.



I hate dealing with all these different systems. I wish it was just the phone.



Yeah I used the Samaritans years ago. But I haven't had any contact since.



Why map the journey

- **Context.** Mapping the journey provides context for your project, allowing you to see events before and after the current interactions.
- **Identify failings.** A journey map makes it easier to identify friction and gaps in the user's experience, especially between organizational silos.
- **Planning.** A journey map can help identify projects that would address shortcomings in the user experience.
- **Alignment.** A journey map can ensure all stakeholders have the same picture of the user's experience and what work needs to be done.

A journey mapping workshop

Often the best way to create a user journey map is to run an in-person workshop, that takes about 3 hours.

Who to invite

End users

Customer facing staff

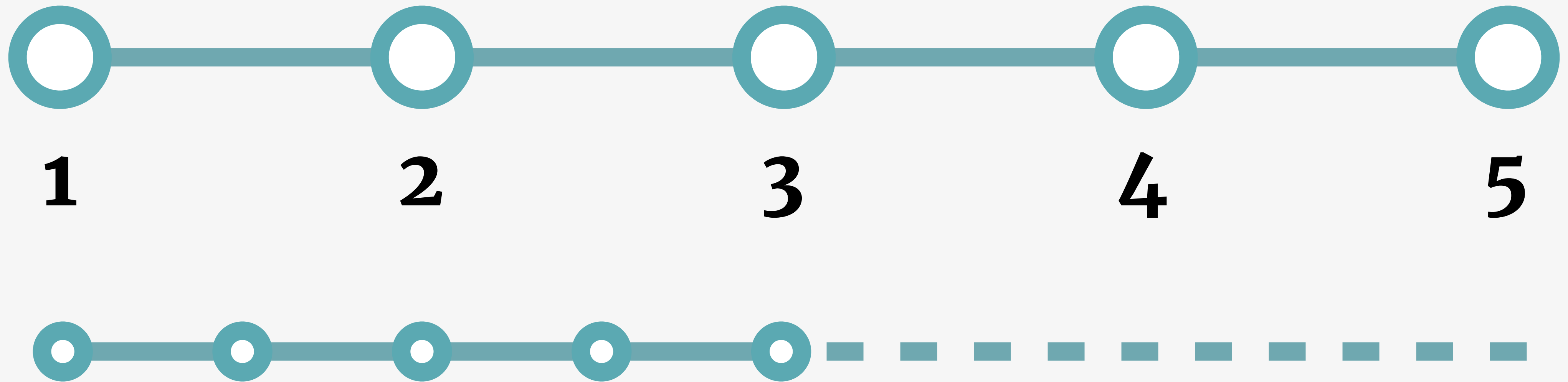
Those with data

Executive sponsor

MOST VALUABLE

LEAST VALUABLE

Deciding on scope



Decide on stages

	Discover	Research	Purchase	Delivery	Post-Sales
Task					
Questions					
Touchpoints					
Emotions					
Influences					
Weaknesses					

Decide on insights

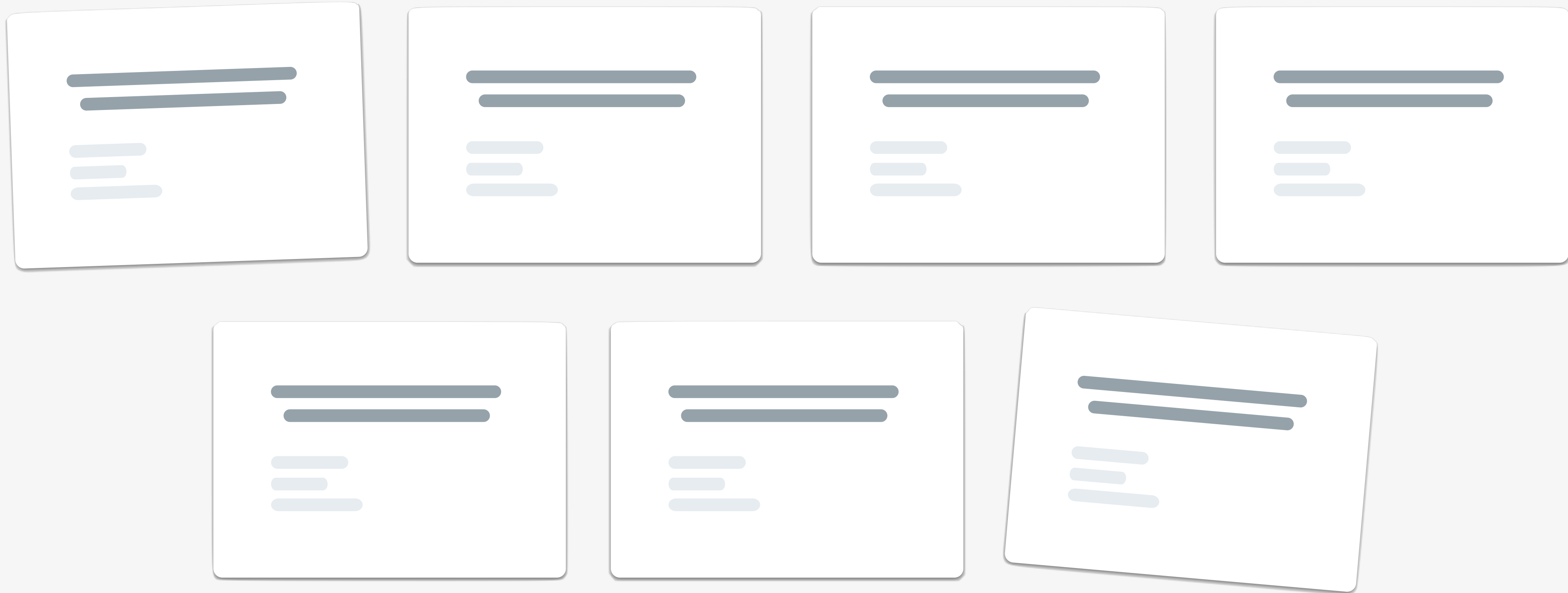
	Discover	Research	Purchase	Delivery	Post-Sales
Task					
Questions					
Touchpoints					
Emotions					
Influences					
Weaknesses					

Touchpoint confusion

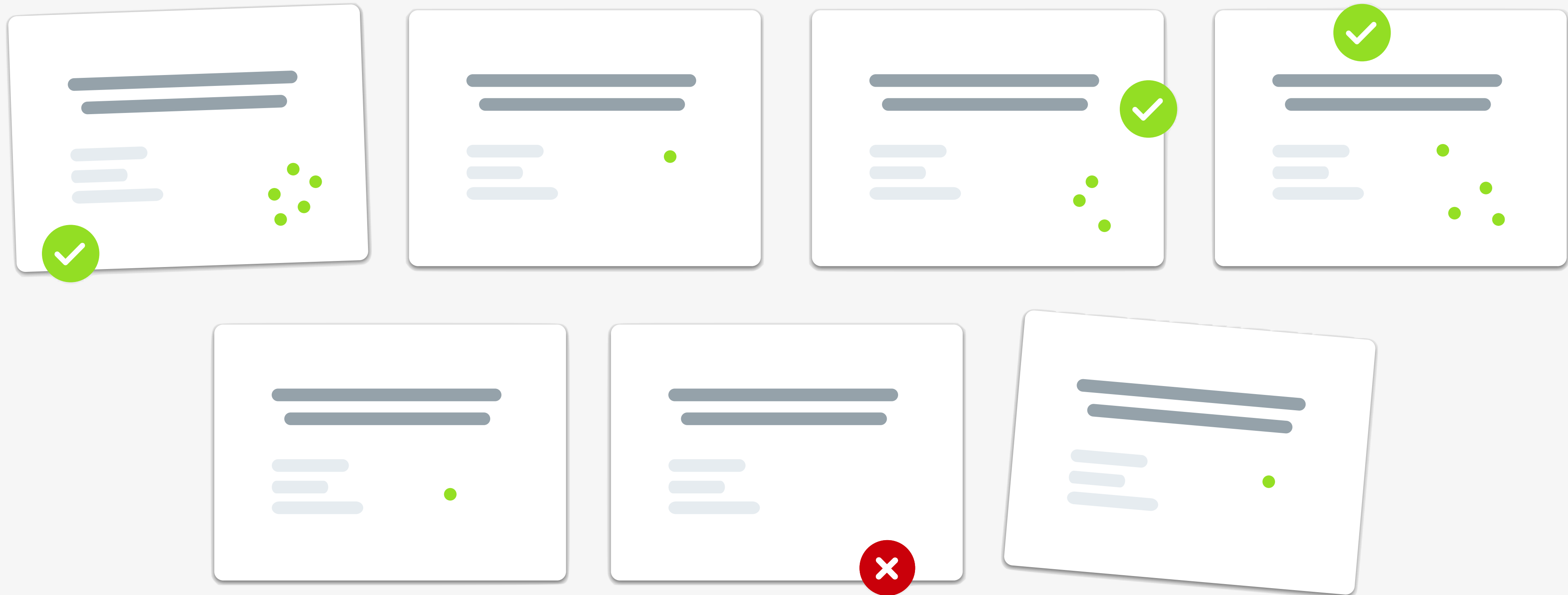
Touchpoints refer to any form of interaction between the user and your organization.

- Website
- App
- Social
- Email
- In-store
- Phone

Generating the ideas



Prioritize the ideas



DOING UPFRONT USER RESEARCH / MAPPING USERS' JOURNEYS

Upfront Testing

Your existing digital service and those of your competitors offer a unique opportunity to identify what works and what doesn't.

Why test at this stage?



Check Assumptions

It allows you to validate the feedback you receive from stakeholders.



Low cost of testing

You don't need to build anything to test, making this testing inexpensive.



SWOT

A chance to identify strengths, weaknesses, opportunities, and threats.

What you want to know

Do they get it?

Does it answer them?

Can they use it?

What frustrates them?

Can they find it?

What do they like?

Usability testing

Facilitated Testing

You meet with users and guide them through a series of tasks, questioning them along the way.

Facilitated testing is great for getting to know users and understanding the issues they have.

Unfacilitated Testing

Users are asked to complete tasks independently while being encouraged to think out loud.

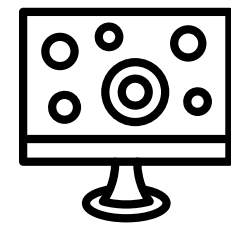
Unfacilitated testing allows you to test with more people but provides less in-depth insights.

Monitoring



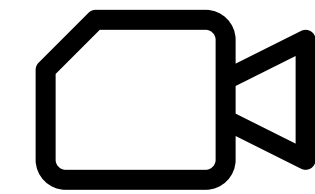
Analytics

Analytics help you to identify where users are abandoning your digital service.



Heat maps

Heat maps can indicate where on a page users are struggling.



Session recording

Session recordings help you to understand why users are struggling.

**More to come on testing
live digital services.**

Conclusion

Keep your upfront research lean to hide the cost.

But take the time to identify your audiences.

And to understand their needs.

**Consider mapping the journey and testing
if time and budget allow.**



Next

Planning Your Information Architecture

A detailed illustration of a mouse standing on a complex, multi-level maze. The maze is constructed from dark, textured walls with intricate carvings. The mouse is positioned on a raised platform, looking towards a distant, glowing cityscape with tall spires and structures. The lighting is dramatic, with strong highlights and deep shadows, creating a sense of depth and mystery.

Working With Information Architecture

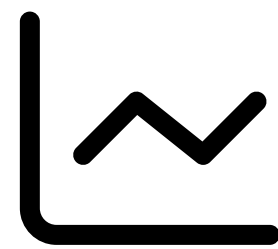
Time can be wasted debating the best ways to organize information and functionality. User research and testing can remove this waste and improve the final deliverable.

Why use my proposed approach?



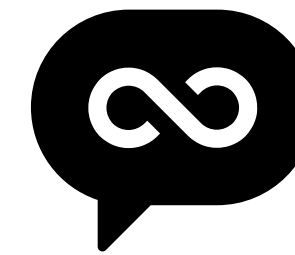
Improve findability

An inability to find the content and features required is a common point of friction.



Less Pushback

Because I am suggesting a data-driven approach, it is harder to criticize.



Less debate

A process for defining your IA will avoid internal debates that delay the project.

Identifying the users top tasks

It is essential to identify the 20% of your content or features that 80% of users will primarily be interested in. Tailor your information architecture around this key content to optimize user experience.

Introducing top task analysis

Top task analysis is a user-centered method that identifies the most crucial tasks users aim to achieve on a website, streamlining the design for enhanced usability and satisfaction.

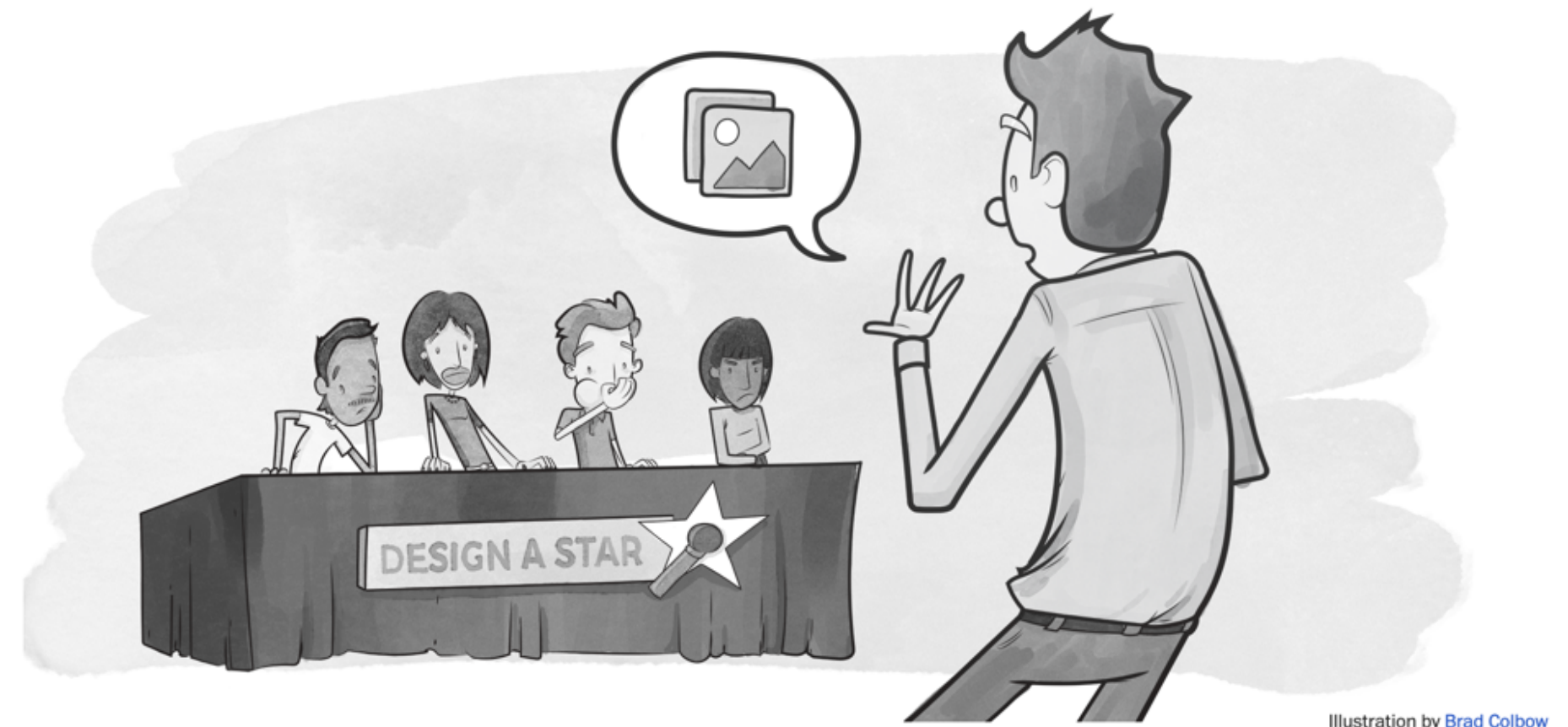


Illustration by Brad Colbow

What Really Matters: Focusing on Top Tasks

by [Gerry McGovern](#) · April 21, 2015

Published in [Content Strategy](#), [Information Architecture](#), [User Research](#), [Web Strategy](#)

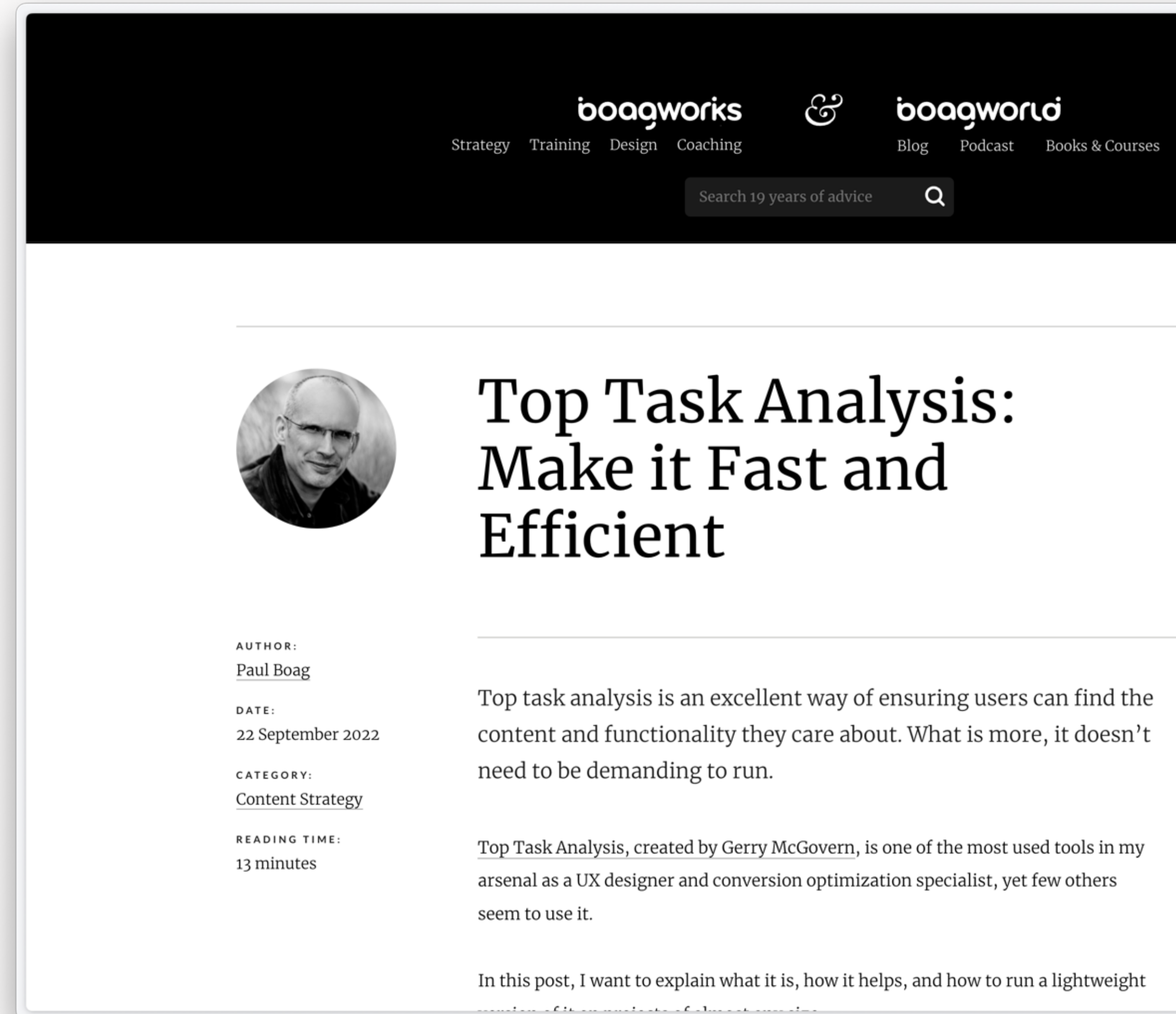
Digital is a space of endless replication. It has never been easier to create—and create, and create. People love to publish, but they hate to remove, which leads to overloaded websites and constant, inevitable redesigns. The top layers get a shiny new coat of graphics and meaningless “we really care” content—but underneath, a teeming mass of out-of-date, badly organized information still swirls about.

The steps involved in top task analysis

1. Gather a long list of potential tasks.
2. Rationalize this list into something more manageable.
3. Get users to vote on what tasks matter the most.
4. Analyze the results.

Top Task Analysis Lite

Top task analysis can be time-consuming to complete so I have adapted the process to be much faster, while still providing a similar quality of results.



The screenshot shows a dark-themed header for 'boagworks' and 'boagworld'. The 'boagworks' logo is on the left with sub-links for Strategy, Training, Design, and Coaching. The 'boagworld' logo is on the right with sub-links for Blog, Podcast, and Books & Courses. A search bar in the center contains the text 'Search 19 years of advice' and a magnifying glass icon.

The main content area features a circular profile picture of Paul Boag on the left. To its right is the article title 'Top Task Analysis: Make it Fast and Efficient'. Below the title, the author's name 'Paul Boag' is listed under the heading 'AUTHOR:'. The date '22 September 2022' is listed under 'DATE:'. The category 'Content Strategy' is listed under 'CATEGORY:'. The reading time '13 minutes' is listed under 'READING TIME:'. The article text begins with 'Top task analysis is an excellent way of ensuring users can find the content and functionality they care about. What is more, it doesn't need to be demanding to run.' and continues with 'Top Task Analysis, created by Gerry McGovern, is one of the most used tools in my arsenal as a UX designer and conversion optimization specialist, yet few others seem to use it.' and 'In this post, I want to explain what it is, how it helps, and how to run a lightweight...

1. Gather some potential tasks

Existing User Research

Site Analytics

Search Terms

Existing Service Testing

Social Media Team

Personas

Customer Facing Staff

CRM Data

Skipping step one is an option

Because we will run a survey allowing people to suggest tasks, it is not strictly necessary to gather tasks in advance. However, seeding the survey with at least some tasks improves results.



You

As somebody considering signing up for Frontend Masters, what tasks or questions might you have when visiting their website. Write these as a list that could be used as part of a top task analysis.



ChatGPT 4



You

As somebody considering signing up for Frontend Masters, what tasks or questions might you have when visiting their website. Write these as a list that could be used as part of a top task analysis.



ChatGPT

Embarking on a journey with Frontend Masters is a promising step towards mastering front-end development. When exploring their website, there are several critical tasks and questions you might have, reflecting common concerns and information needs. These can be used to conduct a top task analysis, ensuring the website's design and content strategy are aligned with user needs. Here's a comprehensive list:

1. Course Content and Structure:

- What topics do the courses cover?
- How advanced are the courses (beginner, intermediate, advanced)?
- What is the structure of a typical course (video lectures, quizzes, projects)?

2. Instructors:

- Who are the instructors, and what are their credentials?
- Do they have industry experience relevant to the courses they teach?

3. Learning Pathways:

- Are there recommended paths for complete beginners?
- How can I find courses relevant to my current skill level and interests?

4. Pricing and Subscription Plans:

- What subscription plans are available, and how do they differ?

...e committing to a subscription?

...cuss course materials and get help?

...offer if I get stuck?

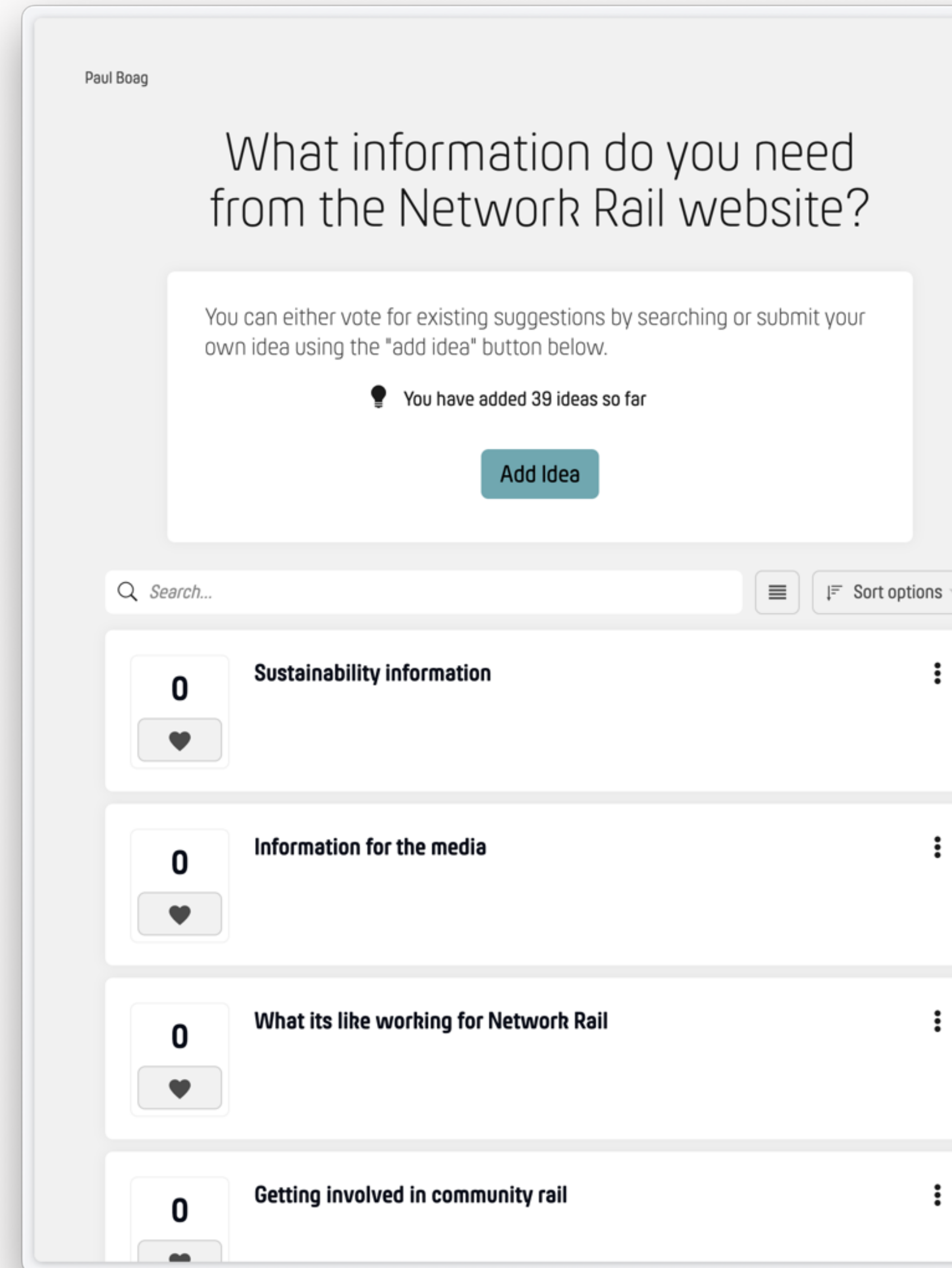
...theoretical knowledge?



ChatGPT can make mistakes. Consider checking important information.

2. Create a survey

1. Create a new survey with PollUnit.
2. Populate that survey with some initial tasks.
3. Ask users to vote for existing tasks or suggest new ones.



3. Clean the results

Remove duplicates

There will be a significant number of suggested tasks that are similar. We need to combine these tasks and their associated votes.

Simplify wording

We want to be able to use the results in card sorting and so we want the description of each task to be as clear and concise as possible.

Chat GPT can help

I want you to act as a data analyst. The attached file is the results of a top task analysis. The "ideas" column contains suggestions for tasks users might want to complete on an HR website, and the "votes" column is the number of times a user voted for that task.

Please complete the following steps in order.

1. Simplify each entry into the "ideas" column to less than 3 words while still attempting to maintain meaning.
2. Identify any ideas that are conceptually similar.

3. Combine similar ideas into a single row with a clear and concise name. Also add together the votes for any ideas that have been combined.

4. Output the new list of tasks with their associated combined votes in a new CSV file with the same columns.

The goal is to end up with a simplified list of less than 70 ideas with their associated votes.

Ask any questions you need to complete this task successfully.

The top 3rd of
your list are
your top tasks



From top tasks to top-level navigation

Your site's top-level information architecture should be defined primarily by your top tasks.

Why focus on your top tasks?

It is crucial to make the primary tasks of your users readily accessible on your website as they are the most vital actions that people want to perform. It is imperative to ensure that smaller tasks do not impede the visibility of the top tasks.

Why focus on top-level Navigation?

If users get the first click was correct, they have an 87% chance of completing the action correctly, as opposed to just 46% if the first click was wrong.

Using card sorting to establish your top-level navigation

Open card sorting

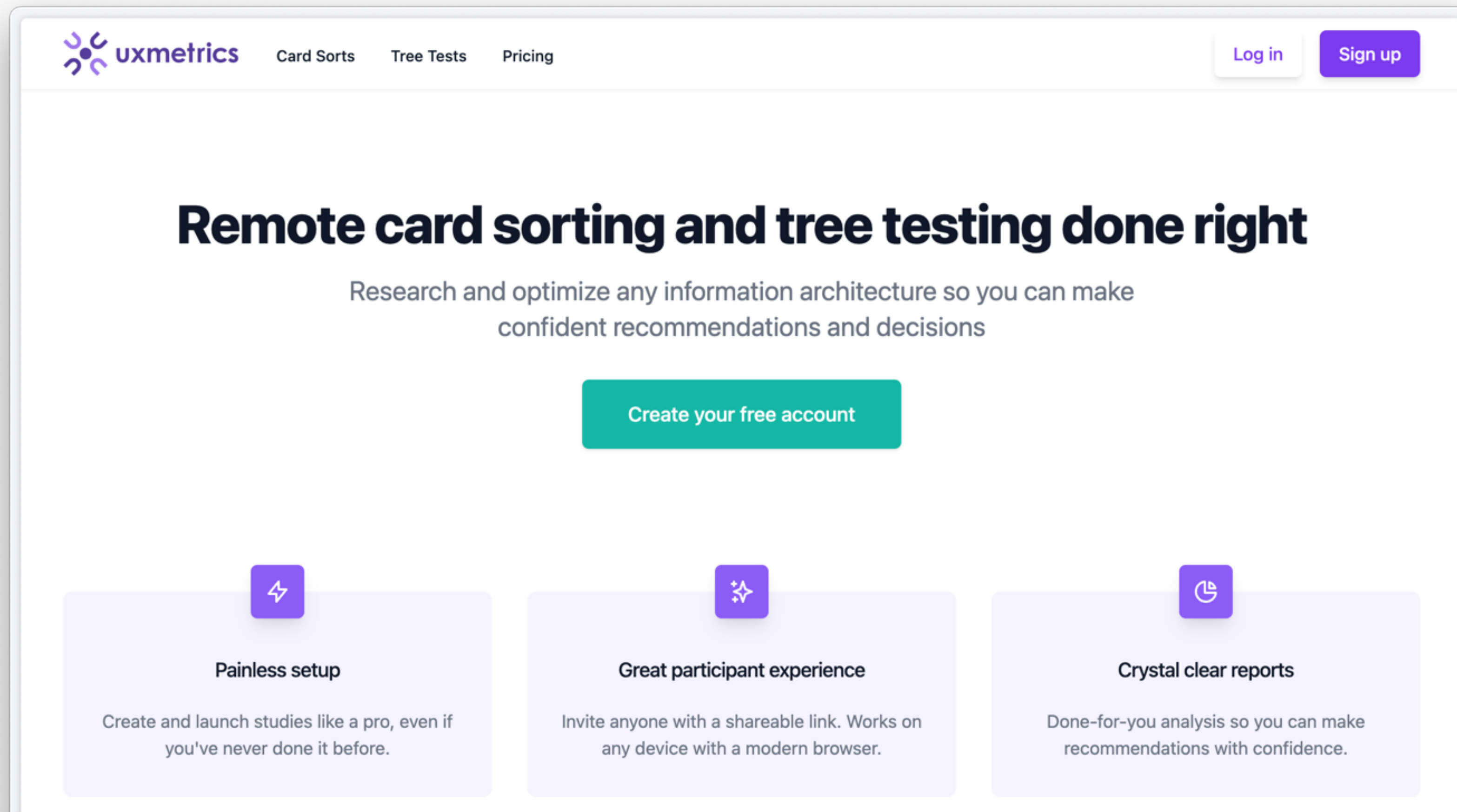
We will use open card sorting to build our top-level navigation around our top tasks.

Closed card sorting

We will use closed card sorting to check that the top-level navigation also works for tiny tasks.

Recommended tool

UXMetrics is easy to use and reasonably priced compared to competitors.



The screenshot shows the UXMetrics website homepage. At the top left is the UXMetrics logo, followed by navigation links for 'Card Sorts', 'Tree Tests', and 'Pricing'. On the top right are 'Log in' and 'Sign up' buttons. The main heading is 'Remote card sorting and tree testing done right', with a sub-headline 'Research and optimize any information architecture so you can make confident recommendations and decisions'. A prominent teal button says 'Create your free account'. Below this are three feature cards: 'Painless setup' (lightning bolt icon), 'Great participant experience' (sparkles icon), and 'Crystal clear reports' (report icon).

uxmetrics Card Sorts Tree Tests Pricing [Log in](#) [Sign up](#)

Remote card sorting and tree testing done right

Research and optimize any information architecture so you can make confident recommendations and decisions

[Create your free account](#)

- Painless setup**
Create and launch studies like a pro, even if you've never done it before.
- Great participant experience**
Invite anyone with a shareable link. Works on any device with a modern browser.
- Crystal clear reports**
Done-for-you analysis so you can make recommendations with confidence.

Open card sorting in action

Instructions All done? Submit

Drag all the cards below into groups that makes sense to you.

↑

Organizational Chart Perks Retirement Sick leave Emergency contact informati

Analyzing your results

1. Go to the results page and click groups.
2. Select groups that are conceptually similar and merge them.
3. Visit the cards tab to identify which card belongs to which group.

uxmetrics Card Sorts Tree Tests

UoF: Employee HR Open Card Sort

Created on 3/1/2023

Participants **188** Unique groups created **676**

Cards **Groups** Individual Results

Select conceptually similar groups to merge them.

GROUP NAME	CREATED BY
<input type="checkbox"/> Benefits	92 Participants

Merge selected groups

FREQUENCY

Chat GPT can help

I want you to act as a data analyst. The attached file contains the results of an open card sort. The column titled "Card_Name" identifies all of the cards in the sort. Subsequent columns contain the names of groups users created. The cell values show the number of times a particular card was assigned to a group.

Complete the following steps:

1. Identify any groups that are conceptually similar.
2. Combine conceptually similar groups. The goal of this step is to reduce the number of groups down to no more than 7.

2. Give each new group a clear and concise name based on the groups combined to create it.
3. Add together the values of any combined groups for each row.
4. Output the new list of cards and groups with their associated combined values in a new CSV file with the same columns.

The goal is to assign each card to one of seven or less master groups based on the value of each cell.

Information architecture tips

- **Fewer options are better.** We can only easily hold four items in our short-term memory, so you tax the user when you have more than four options.
- **Group options.** For options exceeding four, group similar ones together. For instance, categorize product and company information distinctly.
- **Keep label shorts.** Labels must be no more than one or two words to aid scannability.
- **Avoid ambiguity.** Labels must clearly describe their contents to prevent users from wasting time on sections they don't understand.
- **Be distinct.** Each section should be distinct to avoid user confusion on where to find information within the IA hierarchy.
- **Don't fear clicks.** Users will click multiple times if they feel confident about the direction and page loading is quick.

Expanding your draft information architecture

After establishing a top-level navigation focused on primary tasks, the next step is to extend it to accommodate all content.

Two step process

1. Integrate more tasks

While our top-level navigation serves our main tasks, we also need to verify that it accommodates secondary tasks.

2. Accommodate sub sections

For larger sites, a single navigation level is insufficient. We must establish a process to create sub-sections.

Assigning tiny tasks with closed card sorting

Instructions All done? Submit

Benefits

Contacts

Leave

Working at UF

Professional Development

I am not sure!

Drag all the cards below into groups that makes sense to you.

Dental Cover

Flexible working

Events

Managing your benefits

Information requests

Freedom

Creating a closed card sort

1. Create a new closed card sort.
2. Create a group for each of your top-level sections, plus an additional one called "Not sure."
3. Add all your tasks as new cards.
4. Publish and share your online card

The screenshot shows a configuration interface for a card sort. It is divided into three main sections: 'Sort Type', 'Pre-Defined Groups', and 'Cards'. The 'Sort Type' section has three radio button options: 'Open' (unselected), 'Closed' (selected), and 'Hybrid' (unselected). The 'Pre-Defined Groups' section contains a button labeled '+ New Group' with a red arrow pointing to it. The 'Cards' section contains a button labeled '+ New Card' with a red arrow pointing to it.

Sort Type

- Open
Participants sort cards into groups they create and name
- Closed
Participants sort cards into groups pre-defined by you
- Hybrid
Participants sort cards into into pre-defined groups but can also create and name

Pre-Defined Groups

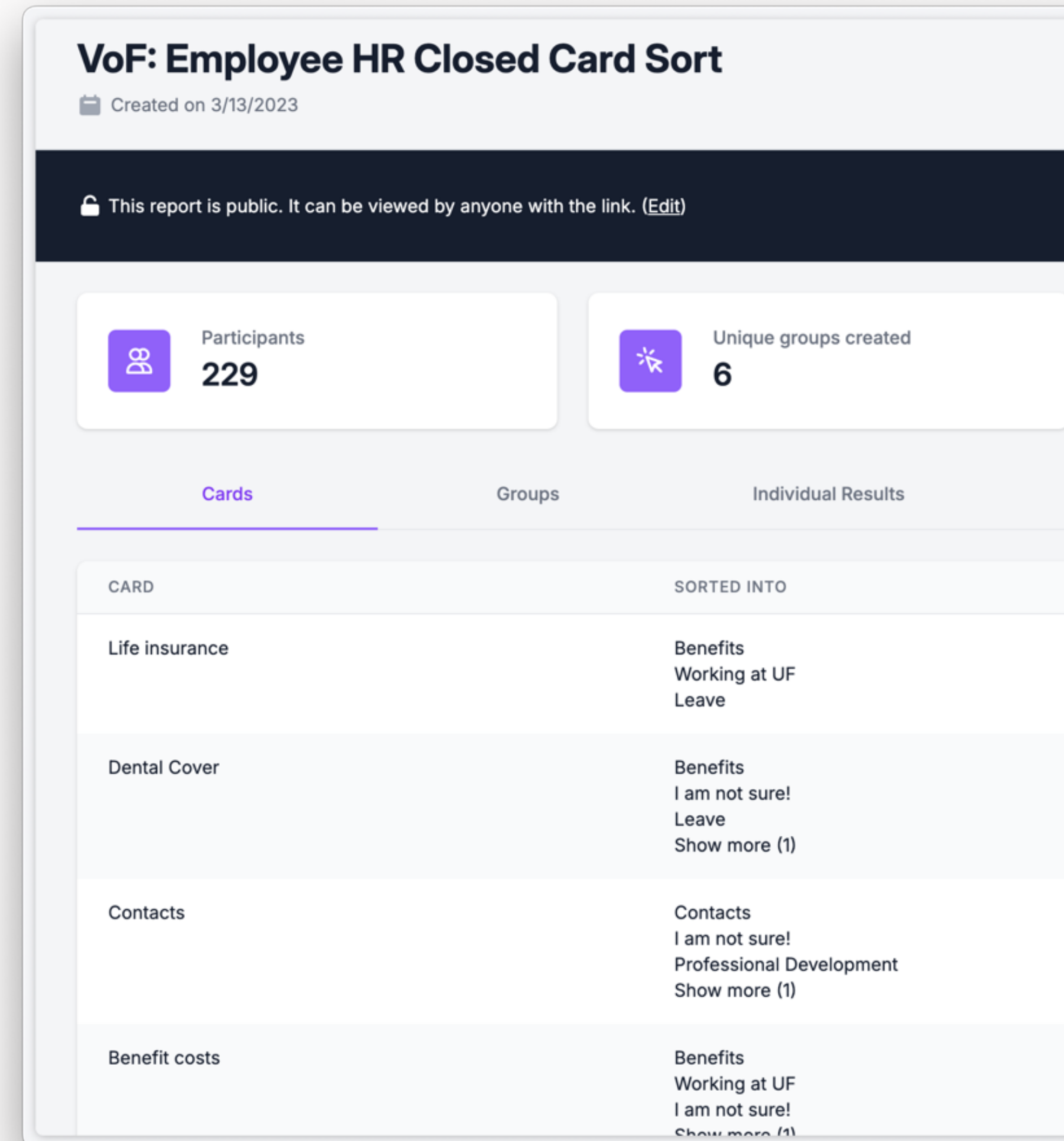
+ New Group

Cards

+ New Card

Analyzing your results

1. Go to the results page and click cards.
2. Check for cards with a low agreement score.
3. Check for cards that are often assigned to "not sure."



IA is not an exact science

You will need to make a judgment call

You'll need to decide what agreement score is acceptable and how to handle uncertain items, considering your organization's culture, audience, and content type.

General rule of thumb

Typically, an agreement score of 50% is adequate. Items marked as "not sure" are usually assigned to the second most popular category. Tree testing can alleviate any stakeholder concerns.

Creating lower level sections

If you have a large number of "tasks" assigned to a single top-level section you will need to organize those tasks into sub-sections.

Avoid having more than 7 child elements within a parent.

Two approaches to sub-sections

More card sorting

For site sub-sections with lots of content, a targeted audience, or high importance, consider a dedicated card sorting exercise for that area.

An educated guess

Sometimes, existing knowledge and research are enough to identify appropriate sub-sections. Use tree testing to validate these assumptions.

Chat GPT can help

Act as an information architect. You have been asked to organize the content I will give you into sub-sections within a University HR website's "benefits" section.

Avoid having more than seven sub-sections. Keep the labels of each section to one or two words. Avoid ambiguity in labeling or two labels being too similar.

Assign content to sub-sections based on conceptual similarity.

The goal is to ensure users can easily find any content within the hierarchy.

Are you ready for the content, or do you have questions?

Testing your information architecture

However you create your initial information architecture, it is essential to test it to ensure people can find the content and features they need.

Tree testing

Tree testing allows us to test our assumptions and content that had a low agreement or was assigned to the "not sure" group.

Task 1 of 10

Imagine you need to find out when the next benefits enrollment is happening. Where would you find this information?



[Home](#)

[Compliance & Policies](#)

[Benefits & Compensation](#)

[Contact & About HR](#)

[Employee Management & Development](#)

[Hiring & Onboarding](#)

[Exiting & Offboarding](#)

[Skip This Task](#)

What to test with tree testing

Content with a low agreement scores

If content scored low in closed card sorting, assess if users can find it in the final information architecture.

Content assigned to "not sure"

We need to ensure that content marked as "not sure" by users is included in the final information architecture.

Top tasks in sub-sections

Ensure top tasks remain accessible, even when nested within sub-sections.

Running tree testing

1. Create a new tree test.
2. Input the site hierarchy.
3. Create a series of tasks.
4. Set the correct destination for each task.

STEP 1 Study Setup

STEP 2 Add Tree

STEP 3 Create Tasks

STEP 4 Advanced Options

Now let's set up a tree representing your information architecture.

Home

Child

Child of Child

Next

Task 1

Task instructions (e.g. "Imagine that you want to update your credit card details. Where would you find that?")

Set Correct Choice(s)

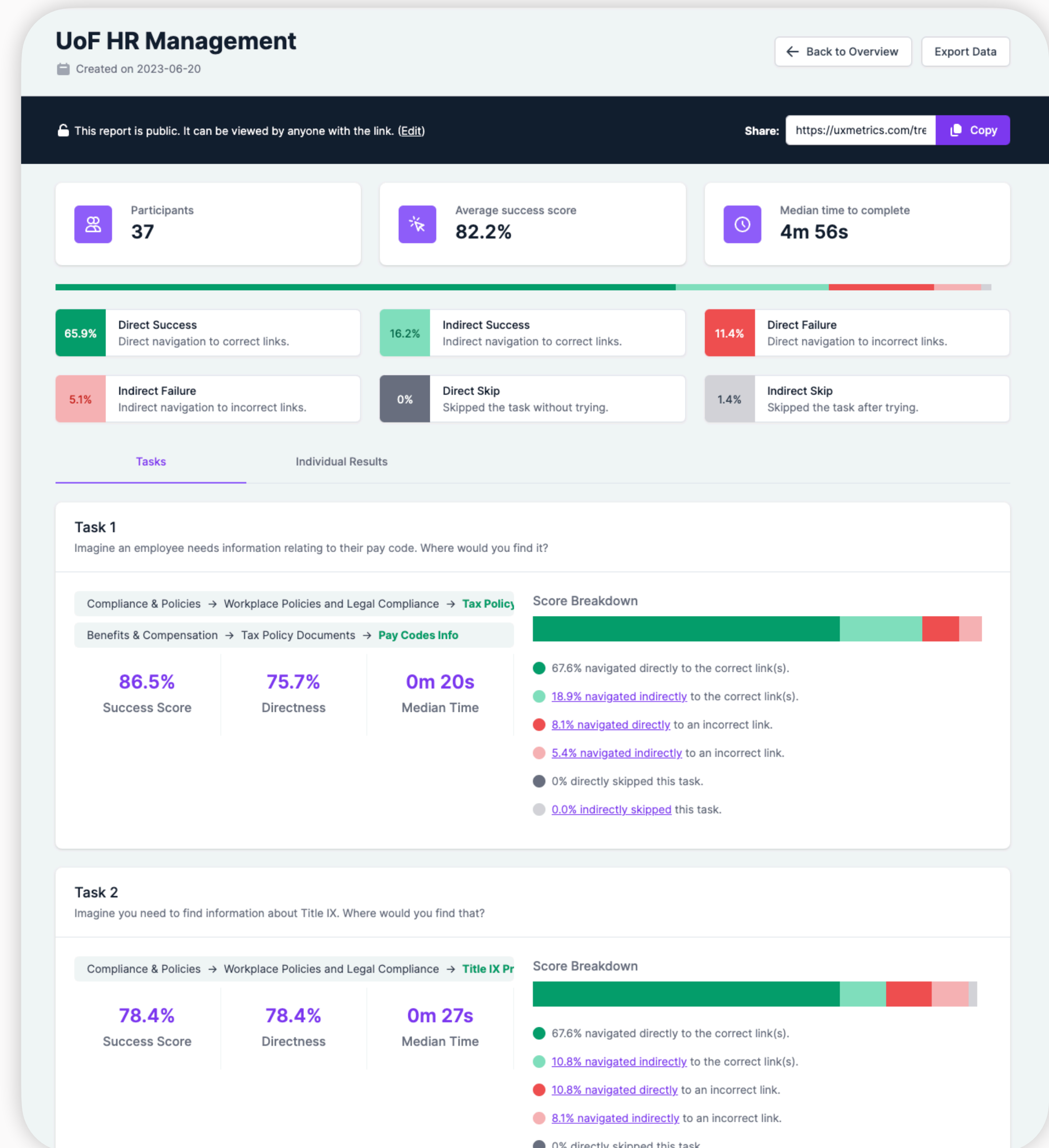
Add Task

Next

Analyzing your results

For each task pay attention to:

- The success score and where those who failed ended up.
- The directness and what route people took.
- The time it took people, on average, to complete the task.



Fixing issues found in tree testing

If many users look for content in incorrect locations, it's crucial to move that content to where they expect it to be. When user opinions about content location vary, use cross-linking to direct them to the correct spot.

Conclusion

Starting with your information architecture enables you to focus on identifying the users top tasks.

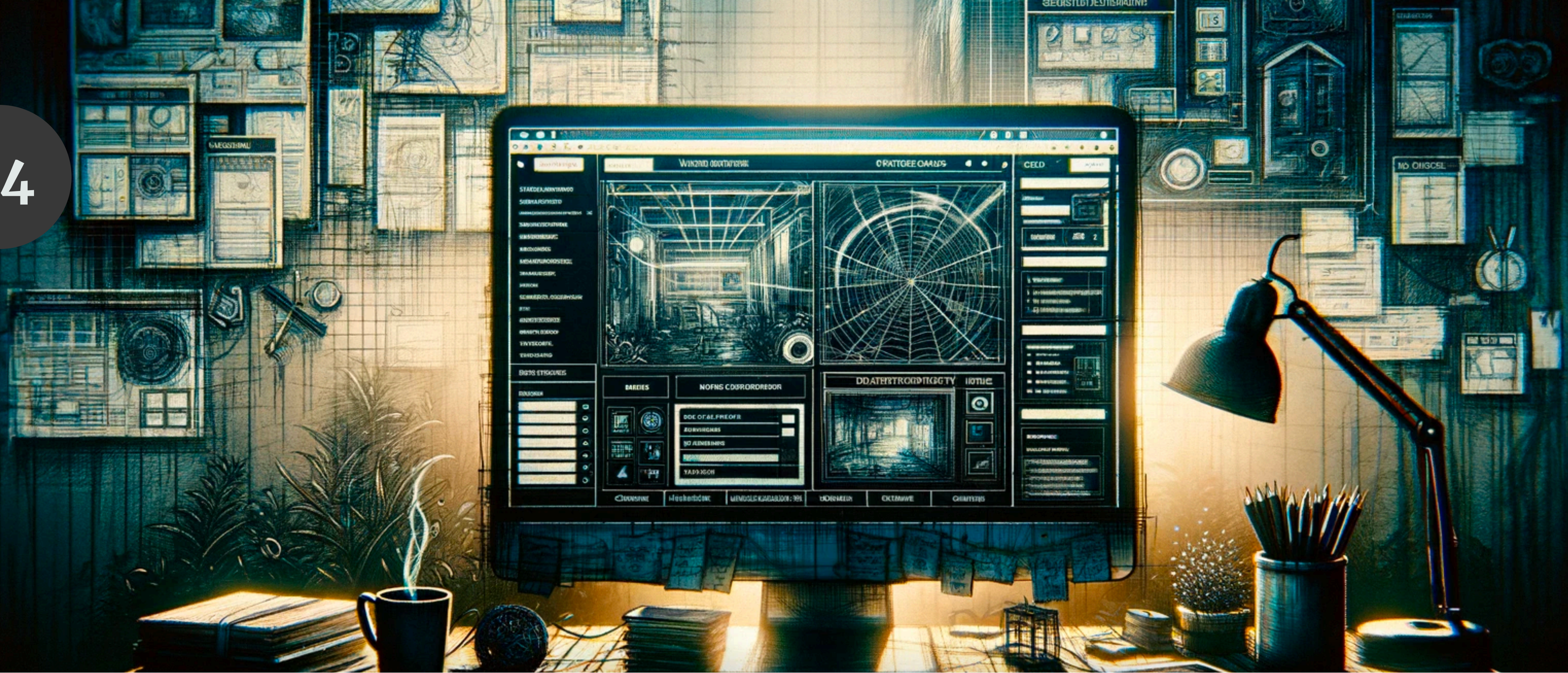
Those top tasks can be used to inform your top level navigation through the use of open card sorting.

Navigation can be validated and expanded through a combination of closed card sorting and tree tests.



Next

Testing Your Design Concepts

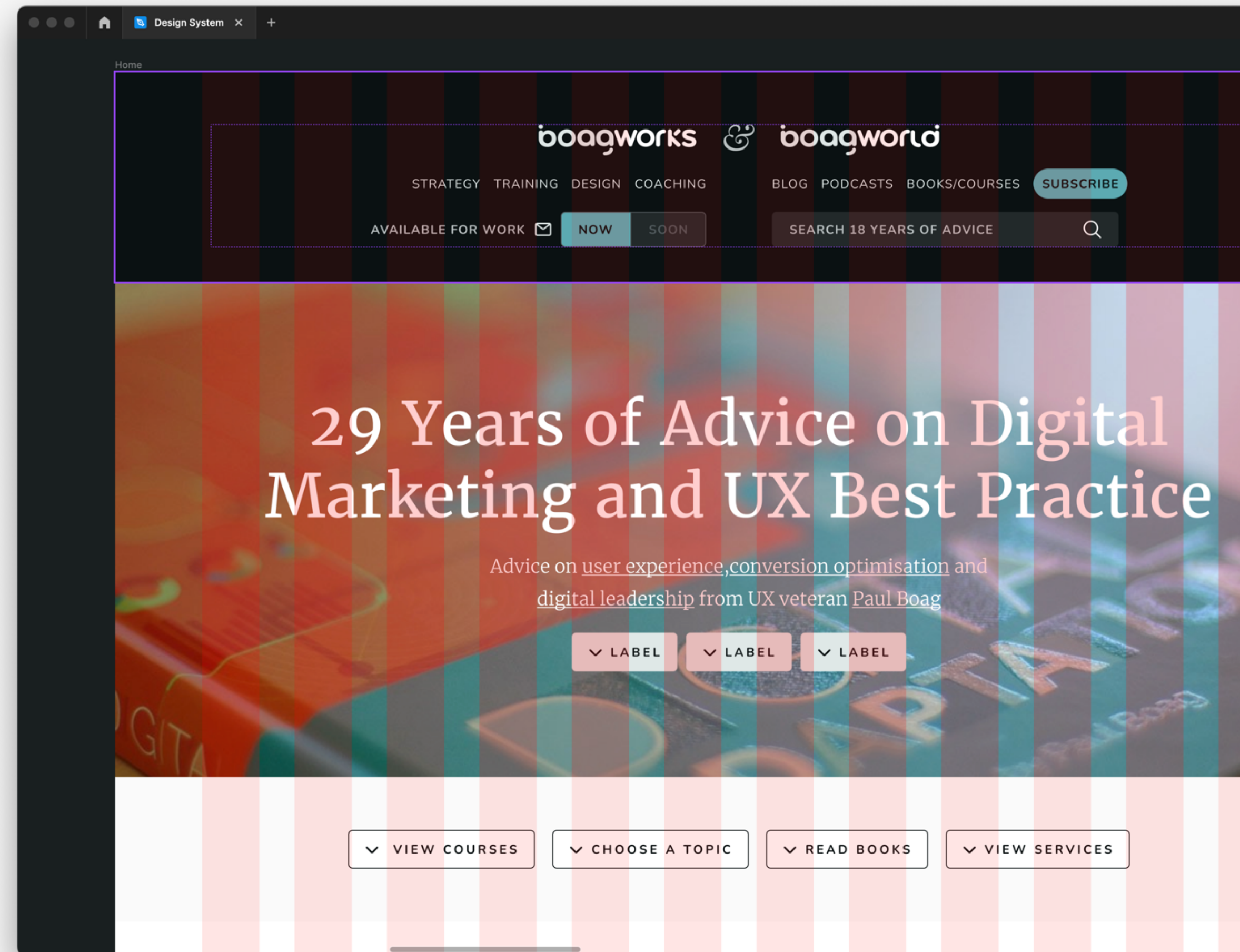


Testing Your Design Concepts

Even with just a design mockup, it's worth carrying out lightweight testing with users.

What is a design concepts

Design concepts are high-fidelity, non interactive mockup of critical pages in the user interface.

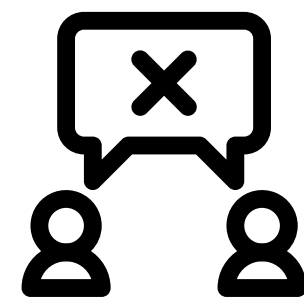


Why test design concepts



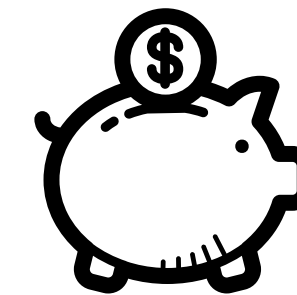
Better Product

Testing significantly reduces the chance of developing something that is not fit for purpose.



Resolve disagreements

Testing can ensure momentum by quickly resolving disagreements over approach.



Saves money

Testing can identify issues early when the cost of fixing them is significantly lower.

What you want to learn



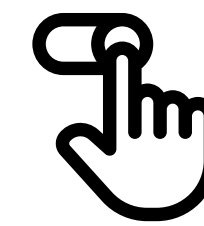
Do they like it?

Does the design visually appeal to the audience and communicate the correct impressions?



Do they get it?

Did they understand the interface and what they could do with it?



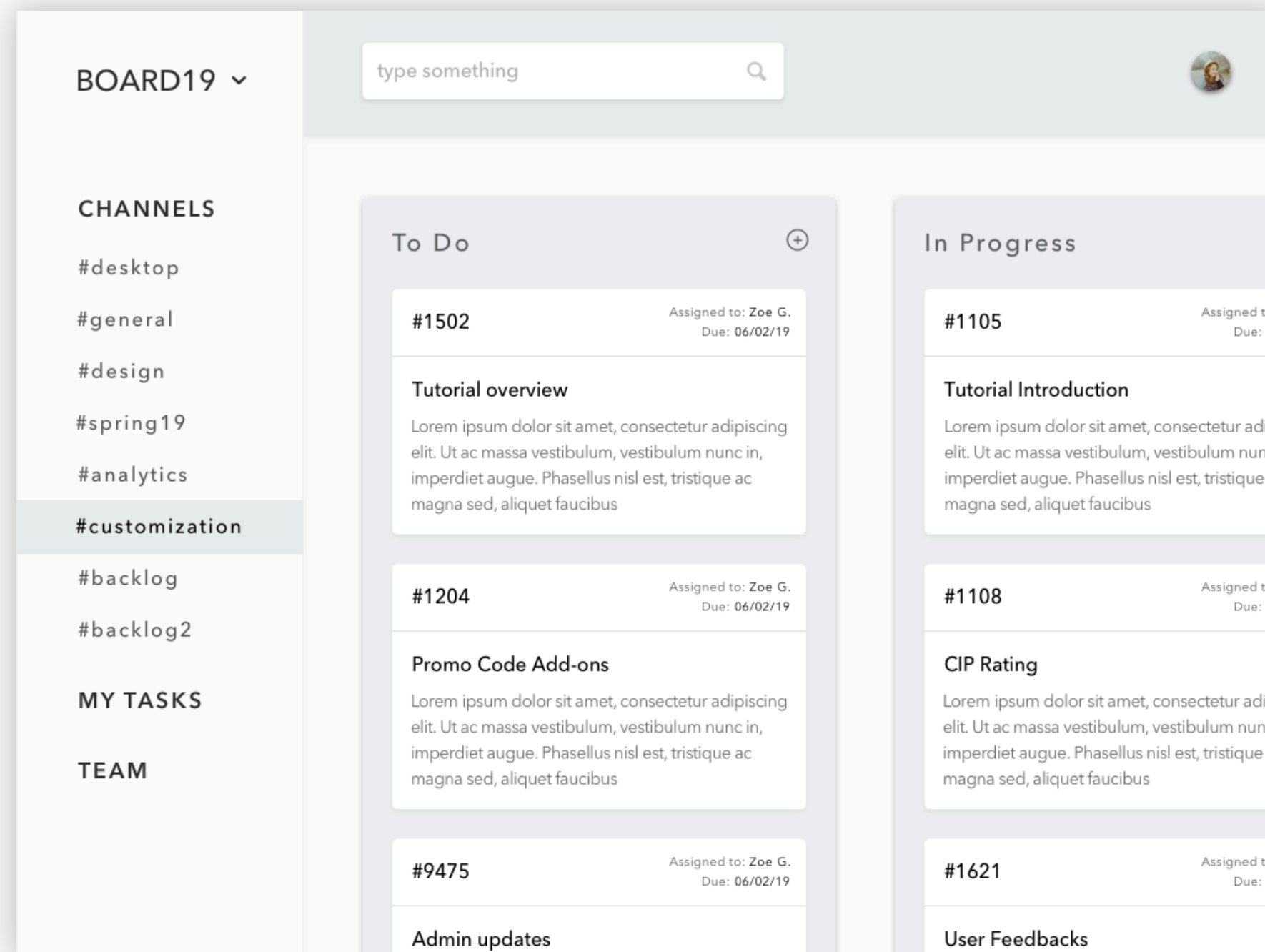
Can they use it?

Did the user see critical elements and will they be able to navigate successfully?

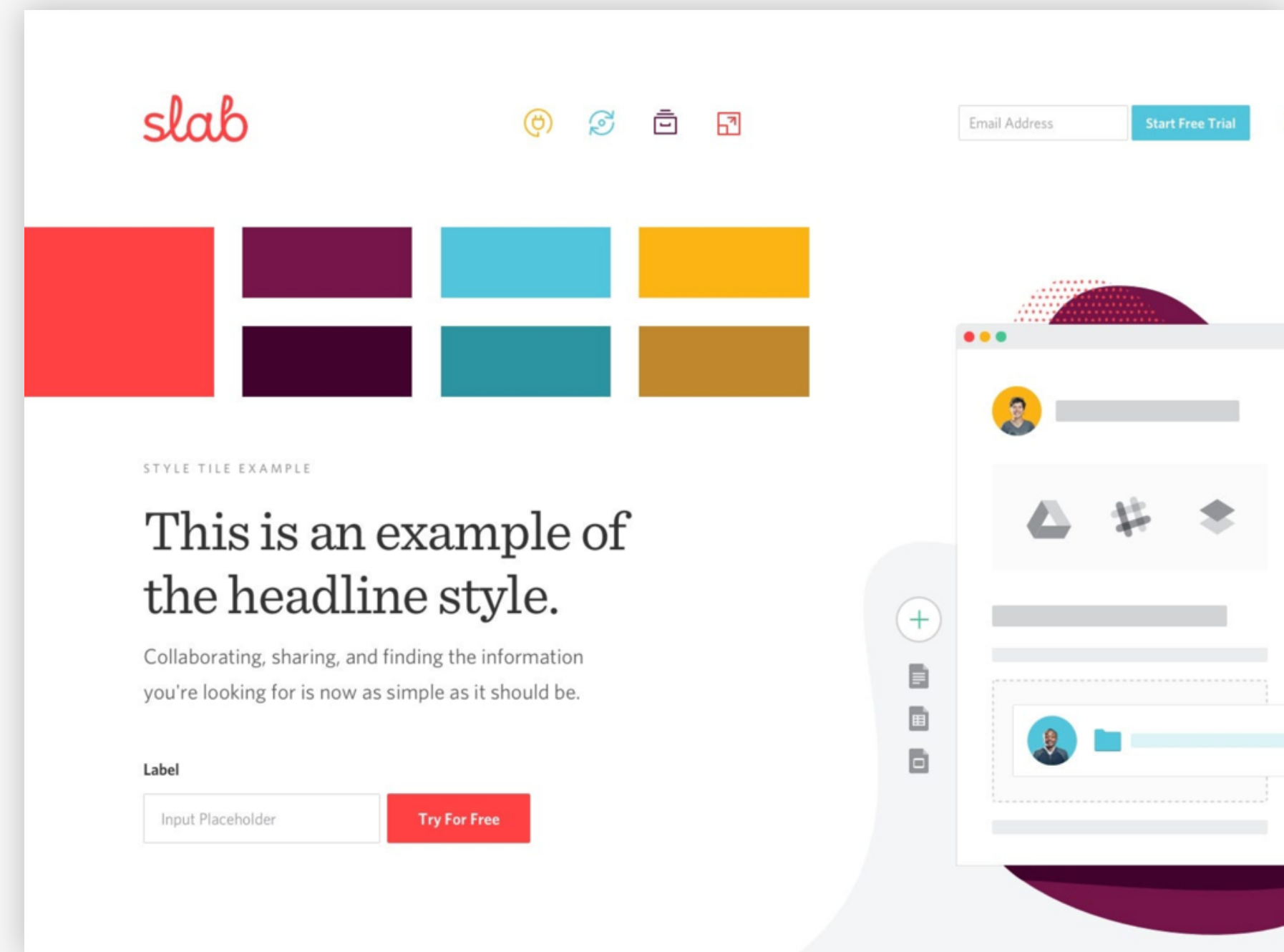
Consider dividing aesthetics and usability testing

Testing aesthetics, usability, and comprehension simultaneously may hinder understanding of user preferences for different design approaches.

Test usability with wireframes

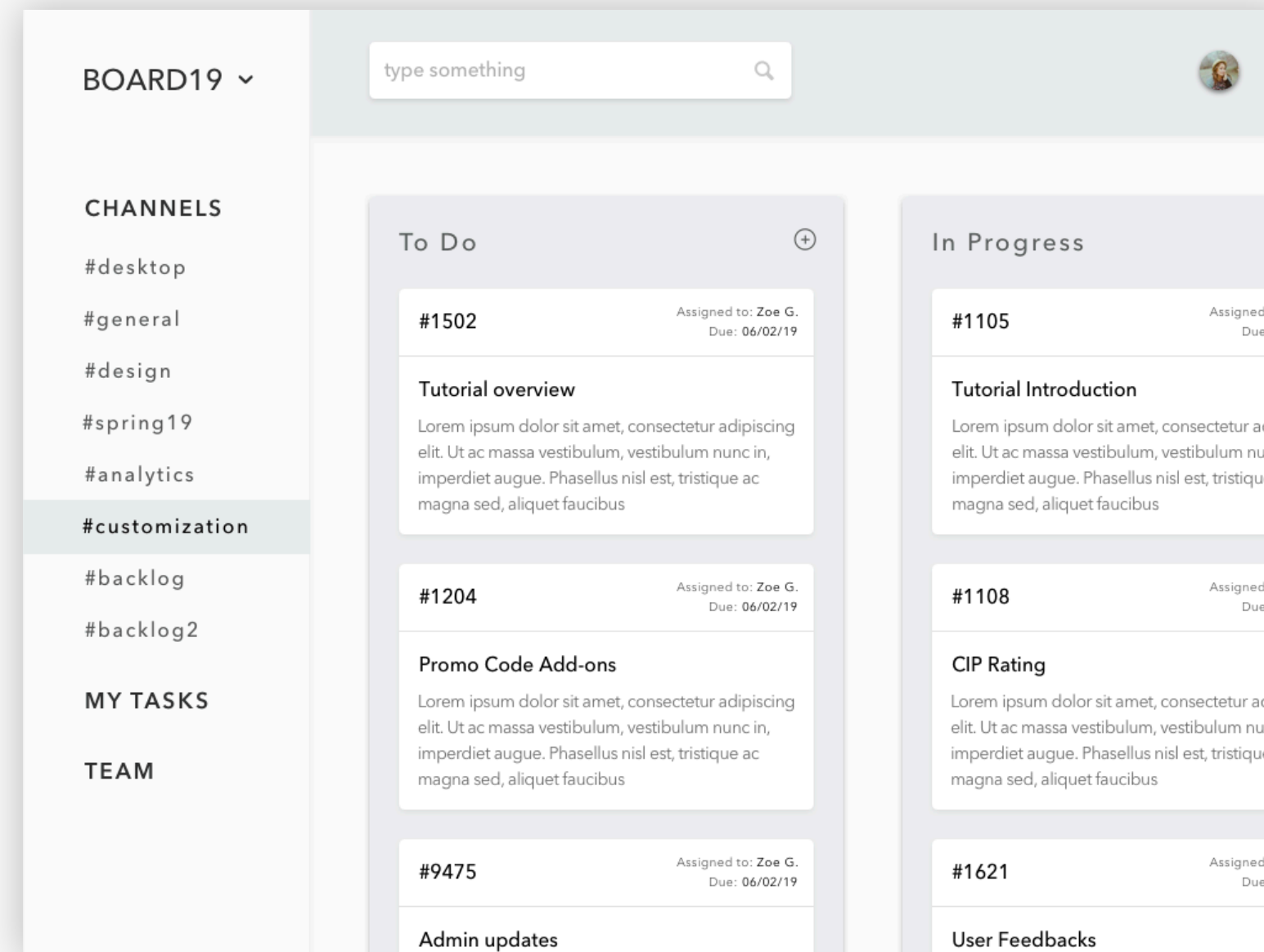


Test aesthetics with style tiles

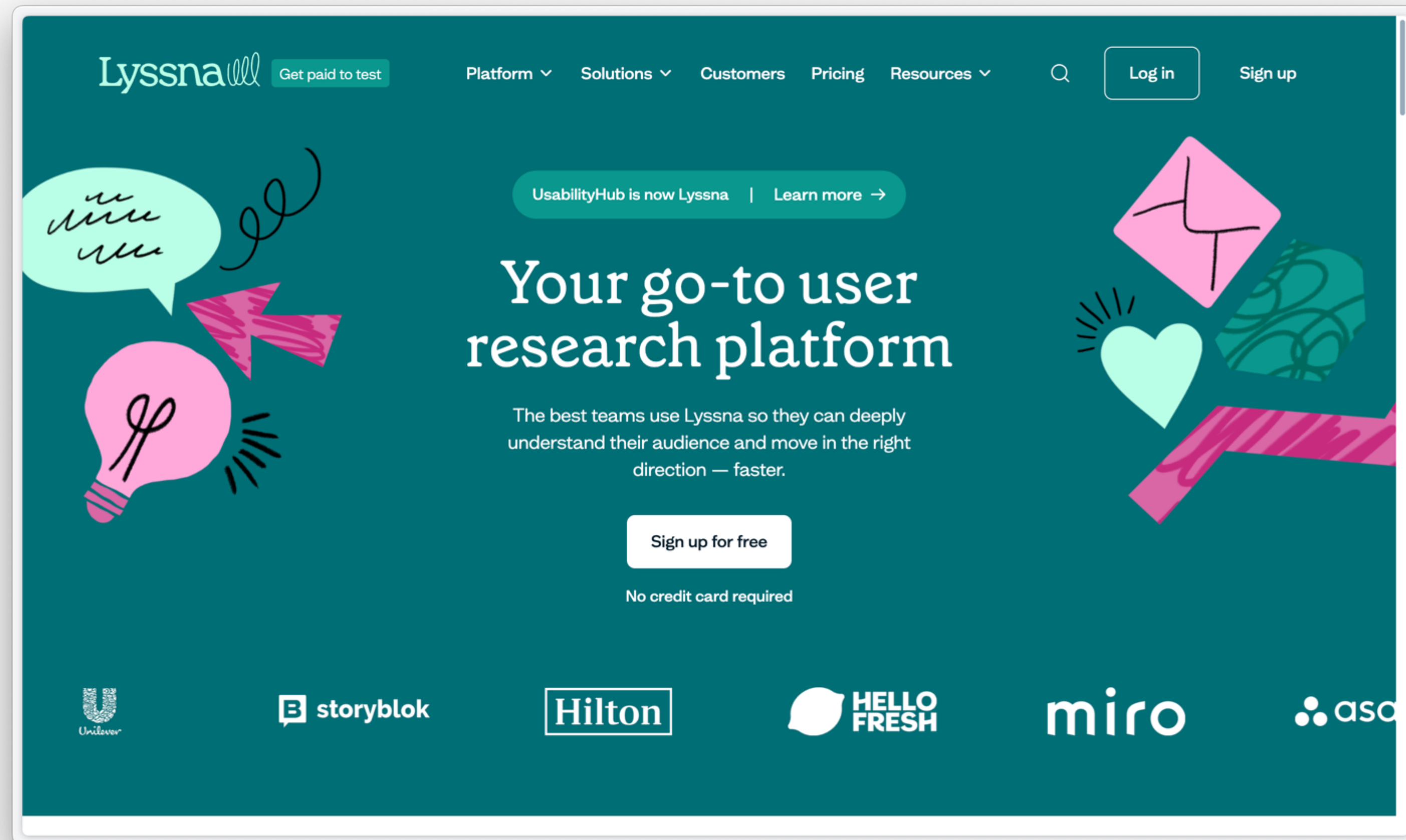


Basic requirements

Testing low-fidelity wireframes without basic content and navigation will be largely pointless.



Lyssna



The image shows a screenshot of the Lyssna website landing page. The page has a dark teal background with white and light green text and graphics. At the top left is the Lyssna logo and a 'Get paid to test' button. The navigation menu includes 'Platform', 'Solutions', 'Customers', 'Pricing', and 'Resources'. On the right, there are 'Log in' and 'Sign up' buttons. A central message states 'UsabilityHub is now Lyssna | Learn more ->'. The main headline reads 'Your go-to user research platform'. Below this, a sub-headline says 'The best teams use Lyssna so they can deeply understand their audience and move in the right direction — faster.' A 'Sign up for free' button is prominently displayed, with the text 'No credit card required' underneath. The footer features logos for Unilever, storyblok, Hilton, HELLO FRESH, miro, and aso.

Lyssna [Get paid to test](#)

[Platform](#) [Solutions](#) [Customers](#) [Pricing](#) [Resources](#) [Log in](#) [Sign up](#)







UsabilityHub is now Lyssna | [Learn more](#) →

Your go-to user research platform

The best teams use Lyssna so they can deeply understand their audience and move in the right direction — faster.

[Sign up for free](#)

No credit card required

TESTING YOUR DESIGN CONCEPTS /

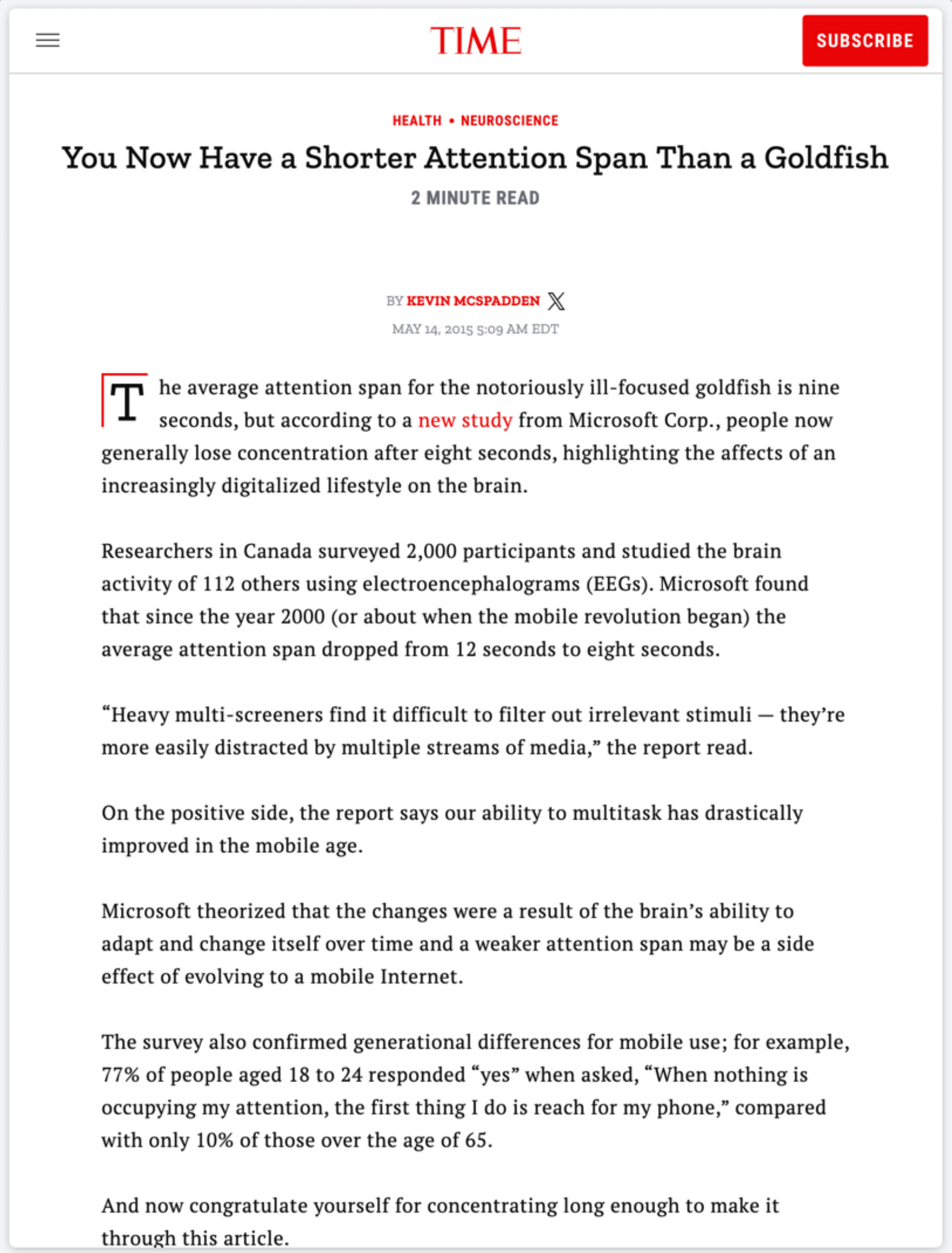
Testing comprehension

When testing comprehension, we are essentially attempting to understand whether users understand what the page is about and what actions they can take from it.

Why test whether they get it.

Users spend about 8 seconds on a page before deciding if it's helpful. If not, they will abandon it.

TESTING YOUR DESIGN CONCEPTS / TESTING WHETHER USERS "GET IT."



The screenshot shows a mobile-optimized article from TIME magazine. At the top, there is a hamburger menu icon on the left, the TIME logo in the center, and a red 'SUBSCRIBE' button on the right. Below the logo, the category 'HEALTH • NEUROSCIENCE' is displayed. The main headline is 'You Now Have a Shorter Attention Span Than a Goldfish', followed by a sub-headline '2 MINUTE READ'. The author is listed as 'BY KEVIN MCSPADDEN' with a small 'X' icon, and the date is 'MAY 14, 2015 5:09 AM EDT'. The article text begins with a large 'T' in a red box: 'The average attention span for the notoriously ill-focused goldfish is nine seconds, but according to a new study from Microsoft Corp., people now generally lose concentration after eight seconds, highlighting the affects of an increasingly digitalized lifestyle on the brain.' The text continues with several paragraphs discussing a study by researchers in Canada, the impact of multitasking, and generational differences in mobile phone use. The article concludes with a sentence: 'And now congratulate yourself for concentrating long enough to make it through this article.'

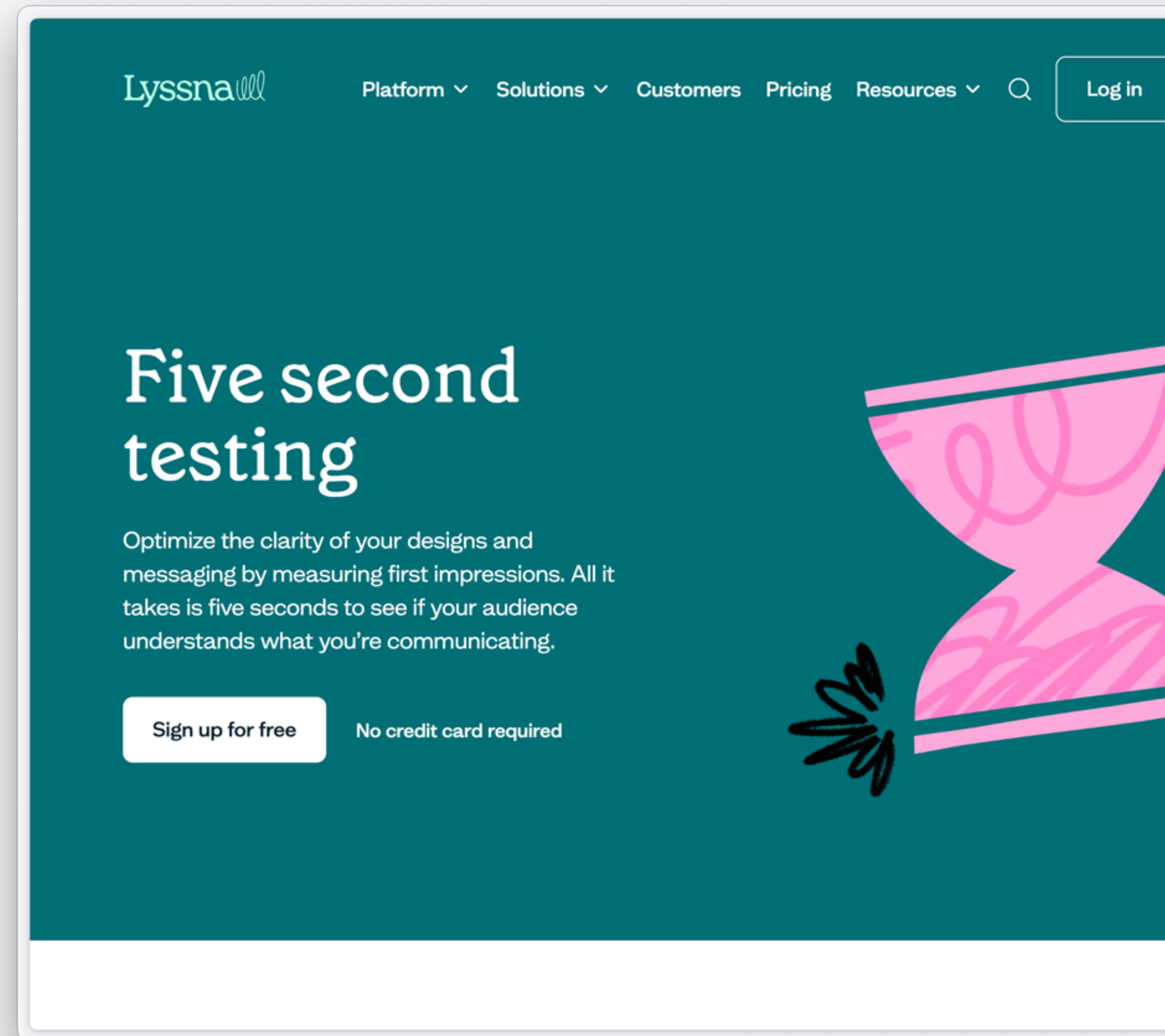
Who to test with

Ideally, you would test with those who are your average user. However, there is an argument that content should be comprehensible to anybody. Not everybody will have industry knowledge.

- New to the sector.
- English isn't their first language.
- They have cognitive disabilities.

5 Second Tests

A 5-second test involves showing users the design for only five seconds, after which they are asked to recall specific details or first impressions, assessing the clarity and effectiveness of its visual communication.



The screenshot shows the Lyssna website with a teal header. The navigation menu includes 'Platform', 'Solutions', 'Customers', 'Pricing', 'Resources', a search icon, and a 'Log in' button. The main content area features the title 'Five second testing' in white text. Below the title is a paragraph: 'Optimize the clarity of your designs and messaging by measuring first impressions. All it takes is five seconds to see if your audience understands what you're communicating.' There are two buttons: 'Sign up for free' and 'No credit card required'. On the right side, there is a pink illustration of an hourglass with a black flower-like shape at its base.

5 Second Test

Created less than a minute ago by Paul Boag

Make variation set

Build Recruit Results 0

Welcome screen

1. Five second test

2. Preference test

Thank you screen

1 to 2 mins 2 credits

Save and preview

Save and continue

Test details

Test name

5 Second Test

Language

English

Project

Search for or create a project

Allow participation on

All devices

Mobile only

Desktop only

Welcome screen

Customize

Add a section

1. Five second test

Instruction (optional)

Look at the design for 8 seconds and remember as much as you can

Design shown for

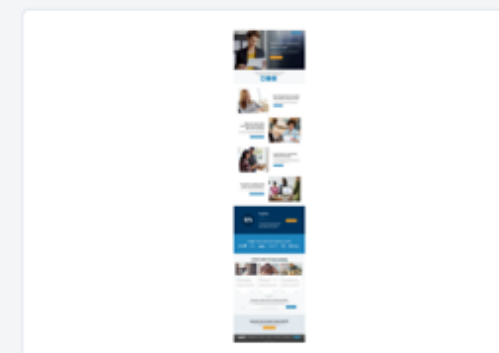
8

seconds

Design

Device frame

No frame



Homepage V2.png

Preview

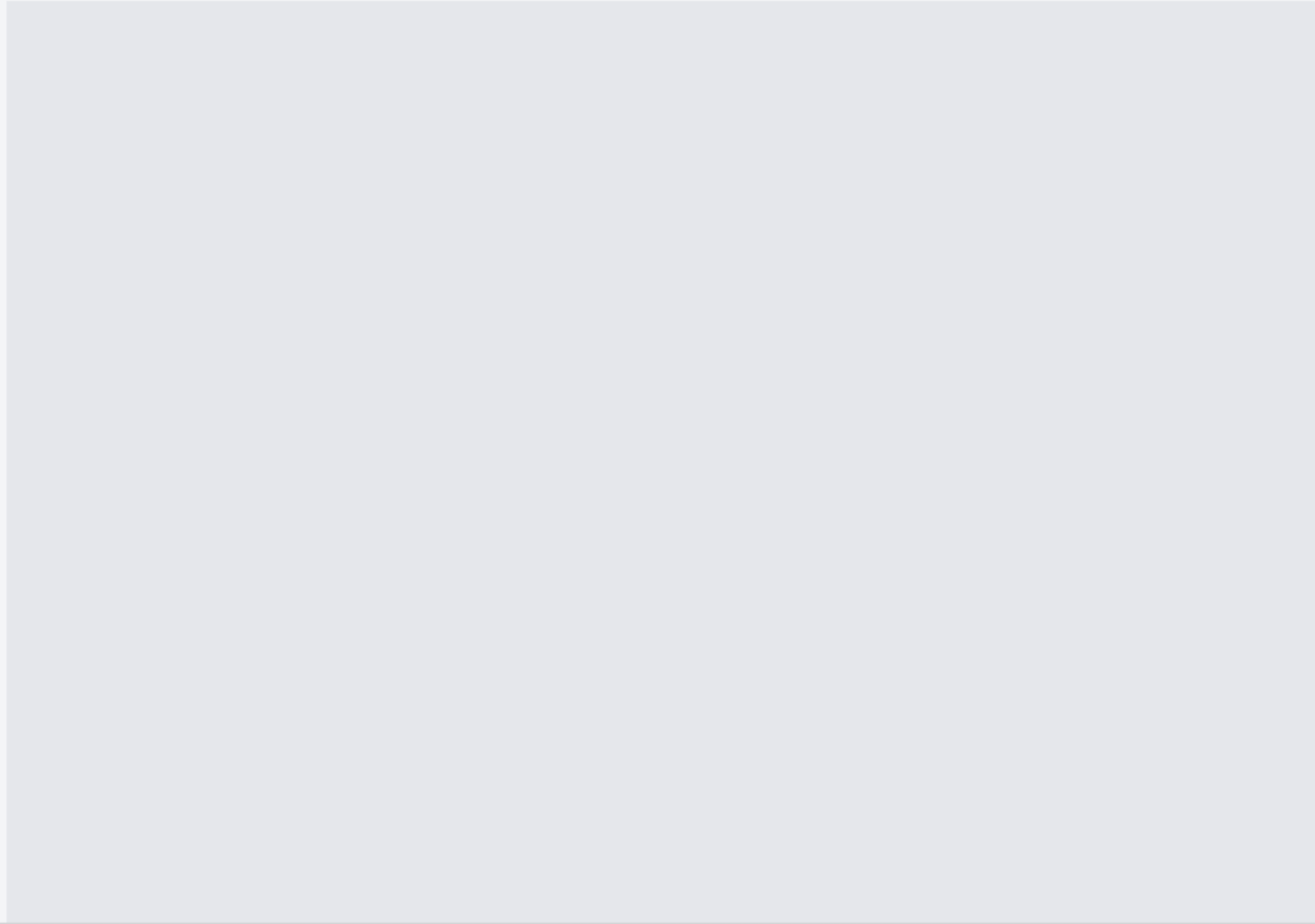
Remove

Pixel density

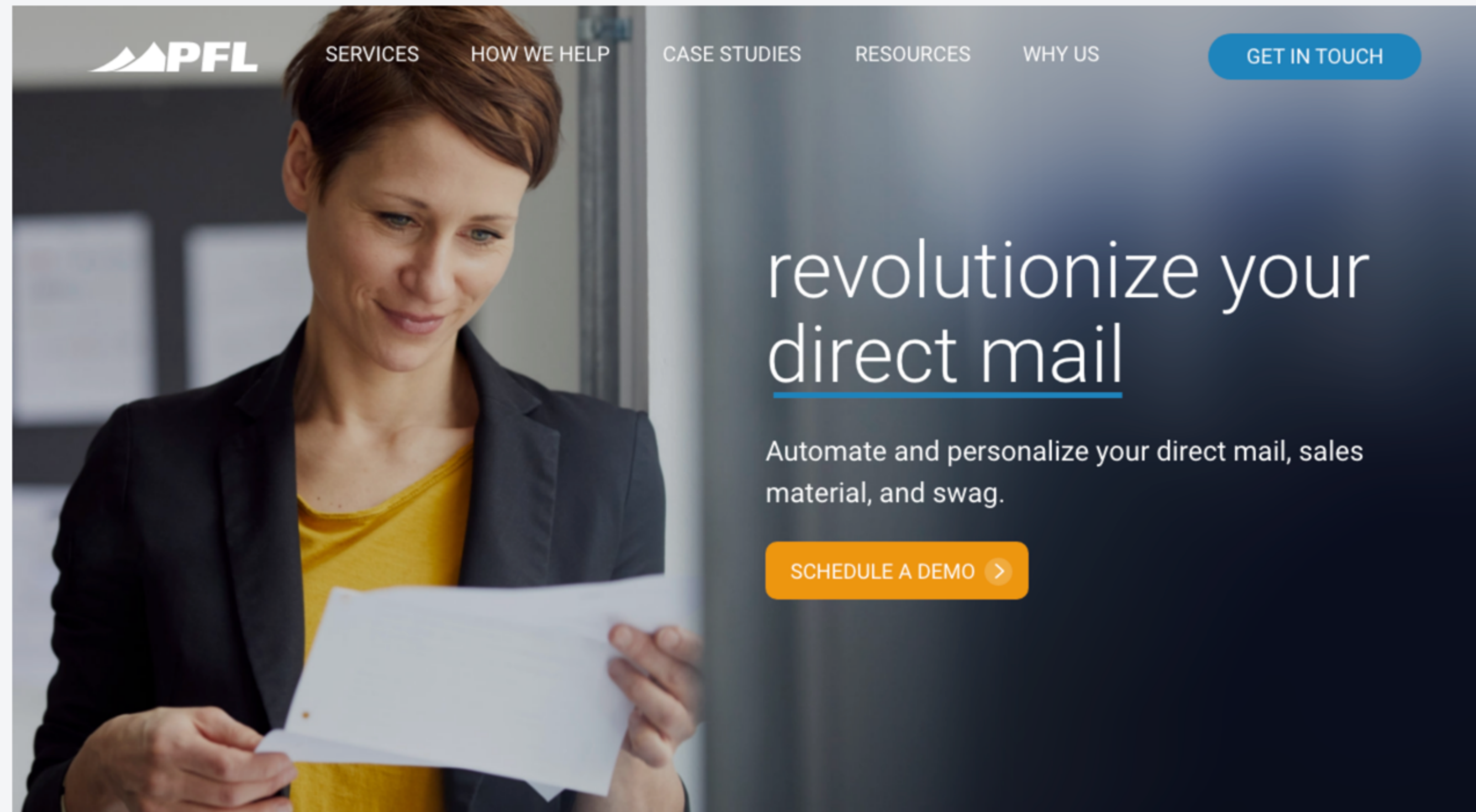
Std-DPI

Look at the interface for 8 seconds and remember as much as you
can

View image for 8 seconds



Look at the interface for 8 seconds and remember as much as you can



Integrate our innovate application with your existing marketing automation or CRM platforms.



In your own words describe what you believe the company featured on the webpage does.

Continue

User interviews

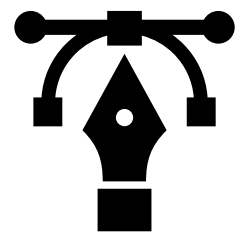
An alternative approach is interviewing some users and showing them your design concepts.

- ✓ More in-depth
- ✓ Can ask followup questions
- ✓ Can see non-visual cues
- ✗ Long lead-time
- ✗ Takes time to run
- ✗ Often smaller numbers

Testing aesthetics

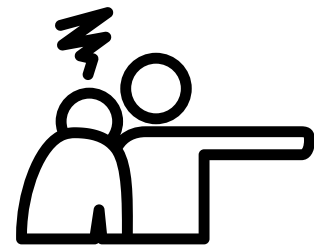
Testing the aesthetics of your design approach is probably the most valuable test you can conduct at the design concept stage.

Why test aesthetics



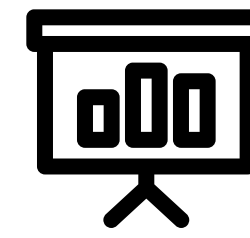
Better Design

Testing the design aesthetic with users ensures the design is as compelling as possible to your audience.



Fewer arguments

Aesthetics are divisive and that can lead to conflict. This results in compromises that please nobody.



More objective

Stakeholder's preferences should not define the direction. Testing introduces objectivity.

Who to test with

Use your primary audience

When testing aesthetics, it's crucial to involve your actual audience as design preferences vary based on background.

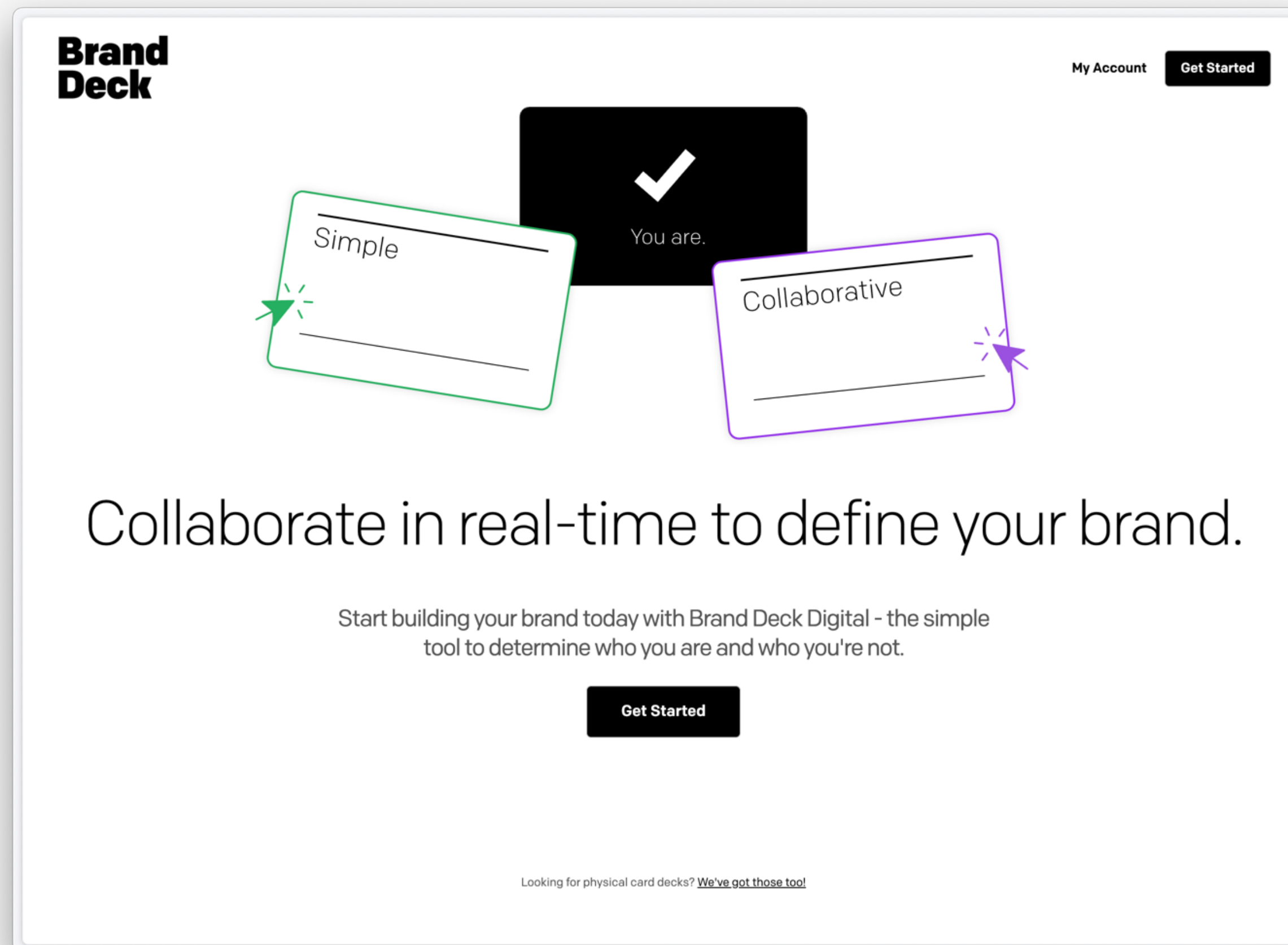
Rely on numbers

To avoid personal bias, test with a statistically significant number of people if you can't use your primary audience.

Agree on brand keywords

Agree with stakeholders which words you want the design to communicate.

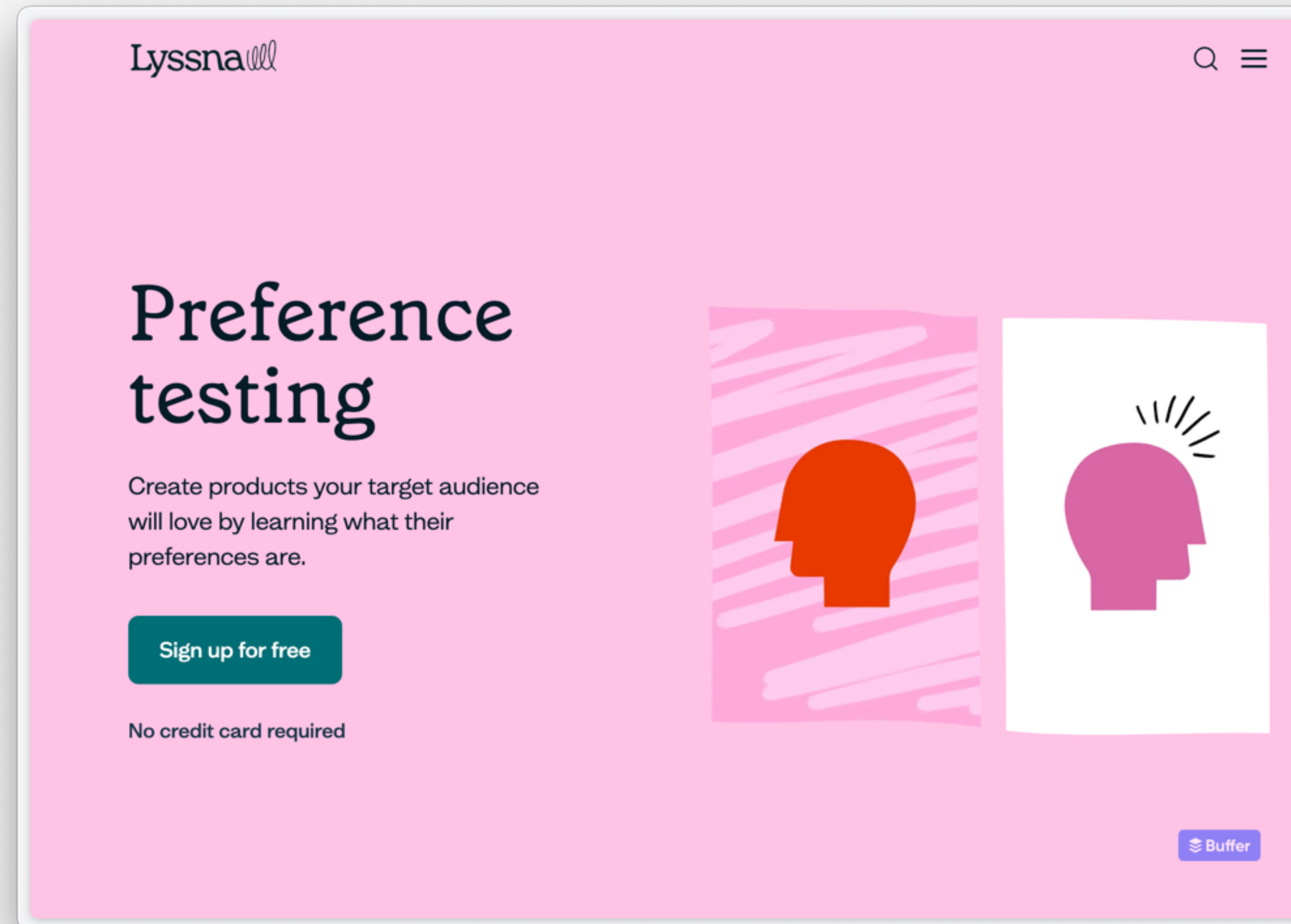
Brand deck is an excellent tool for determining these words.



The screenshot shows the Brand Deck website interface. In the top left corner, the logo "Brand Deck" is displayed. In the top right corner, there are links for "My Account" and a "Get Started" button. The main visual is a central graphic featuring a black square with a white checkmark and the text "You are." Below this, two cards are shown: a green-bordered card with the word "Simple" and a purple-bordered card with the word "Collaborative". Both cards have a horizontal line below the text and a small starburst icon in the bottom right corner. Below the graphic, the text reads "Collaborate in real-time to define your brand." followed by "Start building your brand today with Brand Deck Digital - the simple tool to determine who you are and who you're not." and a "Get Started" button. At the bottom, there is a small link: "Looking for physical card decks? [We've got those too!](#)"

Preference test

Simple preference testing is an excellent way of seeing how well your aesthetics resonate with your audience.



The image shows a landing page for Lyssna, a preference testing service. The page has a pink background. At the top left is the Lyssna logo, and at the top right are search and menu icons. The main heading is "Preference testing" in a large, dark font. Below it is a subheading: "Create products your target audience will love by learning what their preferences are." A dark teal button with white text says "Sign up for free". Below the button, it says "No credit card required". On the right side, there are two illustrations: one of a red head silhouette on a pink background with white brushstrokes, and another of a purple head silhouette on a white background with radiating lines above it. At the bottom right, there is a small blue button with a Buffer logo and the word "Buffer".

Lyssna

Preference testing

Create products your target audience will love by learning what their preferences are.

[Sign up for free](#)

No credit card required

Buffer

Testing different versions

If you have multiple style tiles or different approaches, you can compare them directly.

Testing against competition

Alternatively, you can see how your design approach compares to that of your competitors.

- Test details
- Welcome screen
- 1. Preference test**
- Thank you screen

🕒 Under a minute ● 1 credit

Save and preview

Save and continue

Message

italic **bold** - bullet list 1. ordered list

We are going to show you 3 moodboards. These are not final designs. They are supposed to help inform the design. We want to know which you feel gives the right impression. When you are ready, click the button and **give us your gut reaction**.

Start button text

I understand, let's start

Add a section

1. Preference test

Instruction (optional)

italic **bold**

Which of the following do you most associate with the words "Dependable", "Accomplished" and "Responsive"?


Designs

Device frame No frame ▾

Version 1 ✎

👁 Preview 🗑 Remove

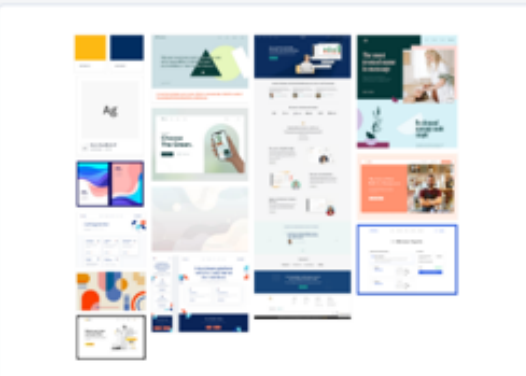
📏 Pixel density Std-DPI ▾



Version 2 ✎

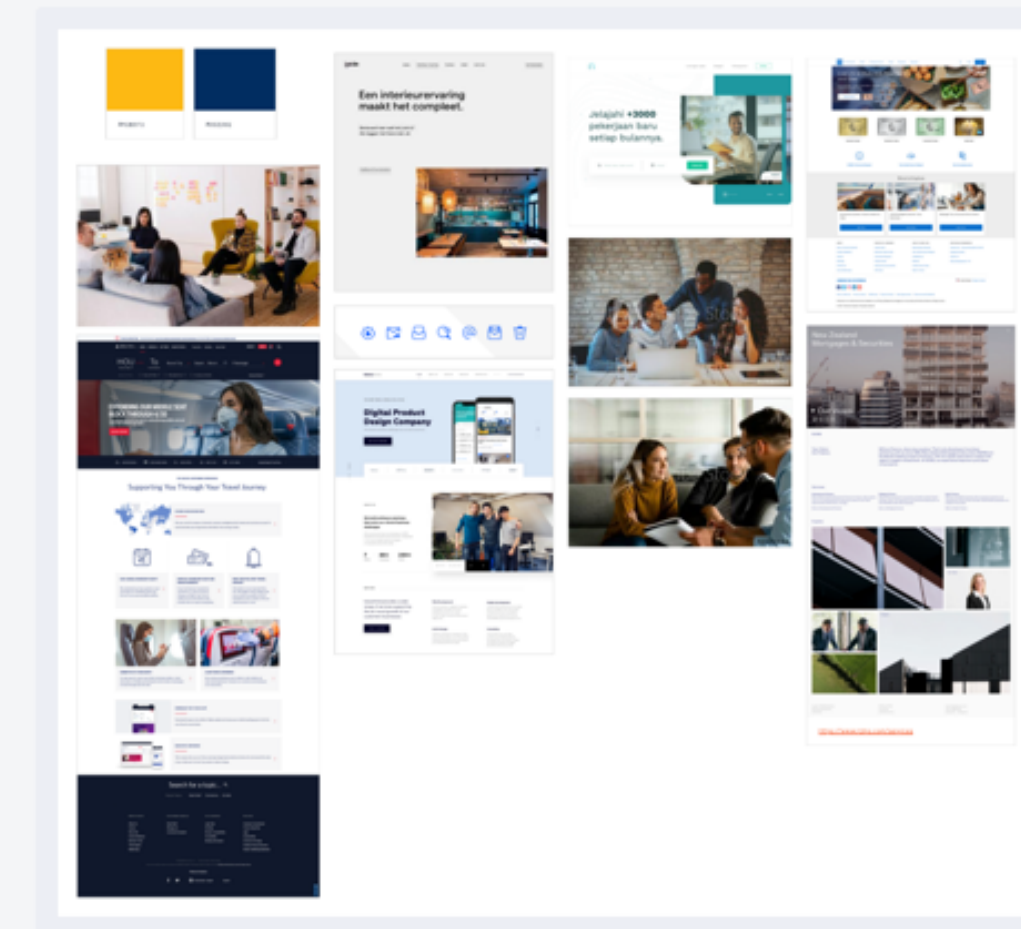
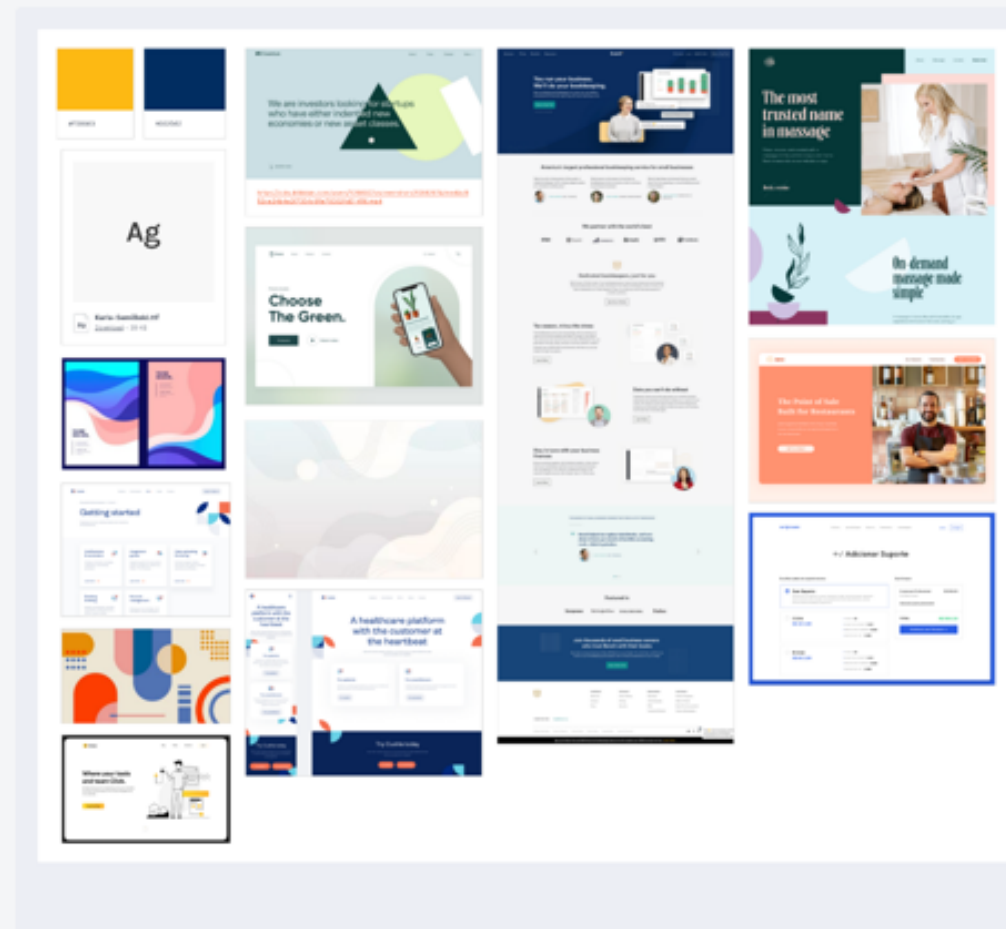
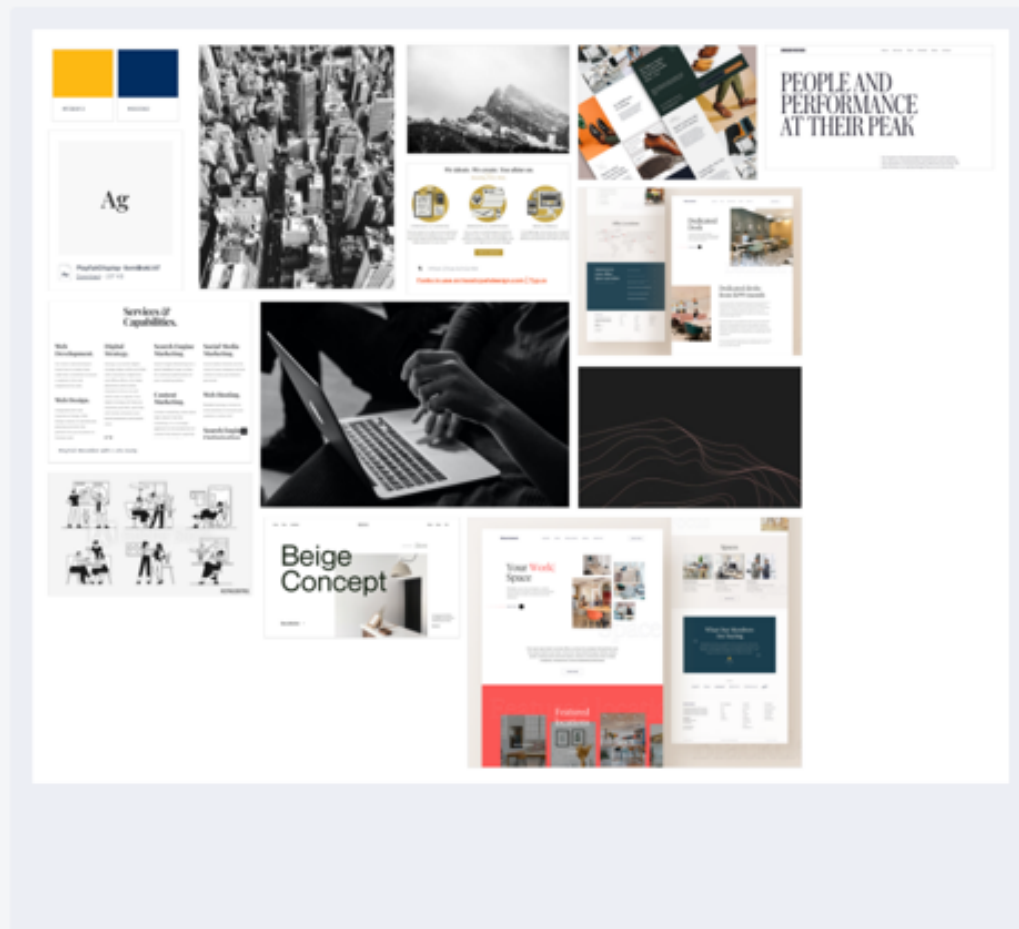
👁 Preview 🗑 Remove

📏 Pixel density Std-DPI ▾



Which of the following do you most associate with the words
"Dependable", "Accomplished" and "Responsive"?

Click an option to review it



CP America

Created Feb 25, 2021 by Paul Boag

Make variation set

Build

Recruit

Results 11

Filters

Participants

Country

United States 11

Age range

Unknown 11

Sources

Self-recruited 11

11

Total participants

11

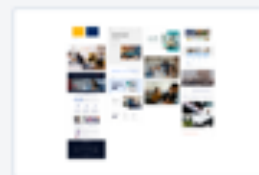
Responses shown

Share

Export 11 results as CSV

1. Preference test

Which of the following do you most associate with the words "Dependable", "Accomplished" and "Responsive"?



Version 3

46s

55%

6



Version 1

32s

45%

5



Version 2

n/a

0%

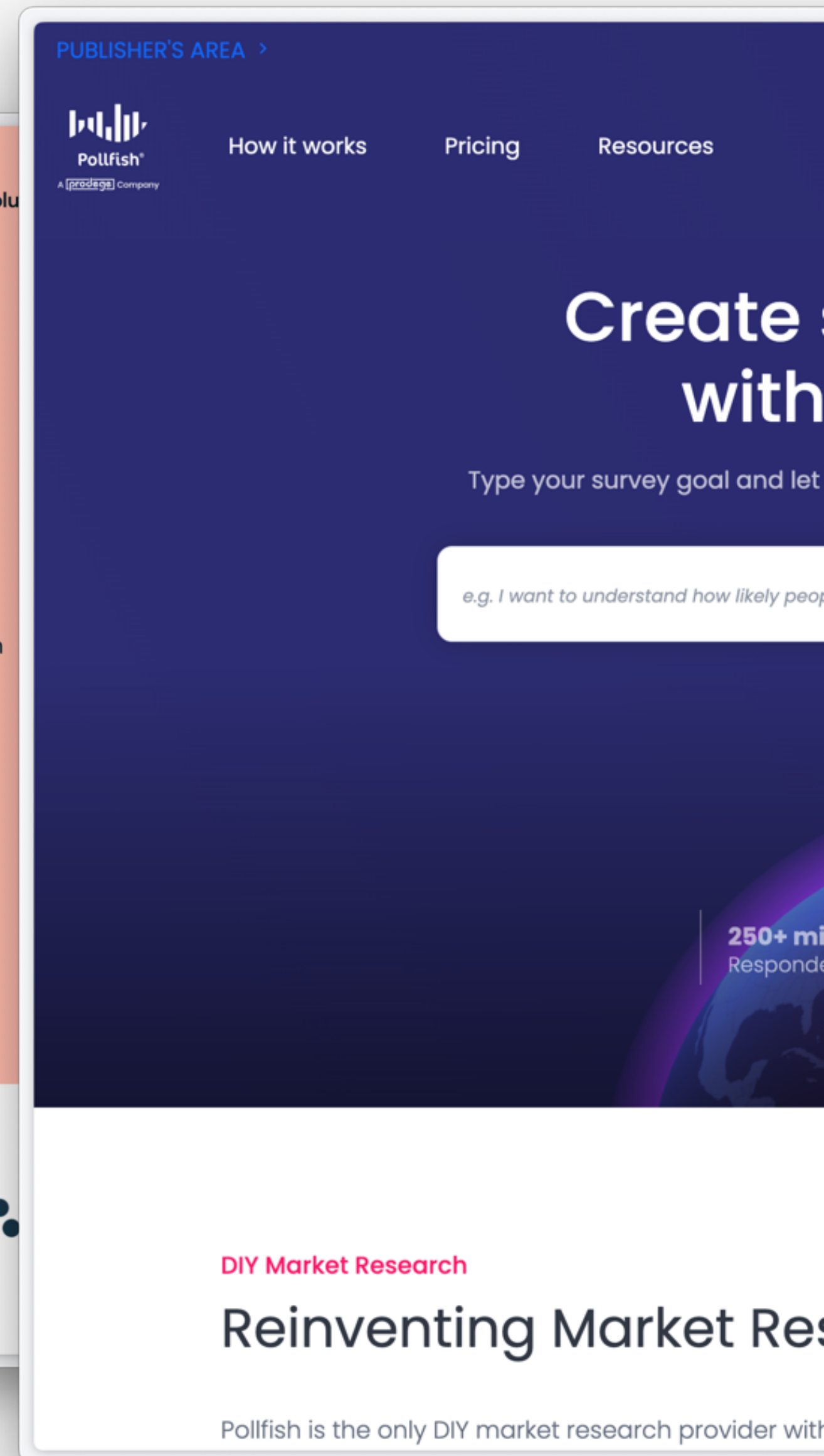
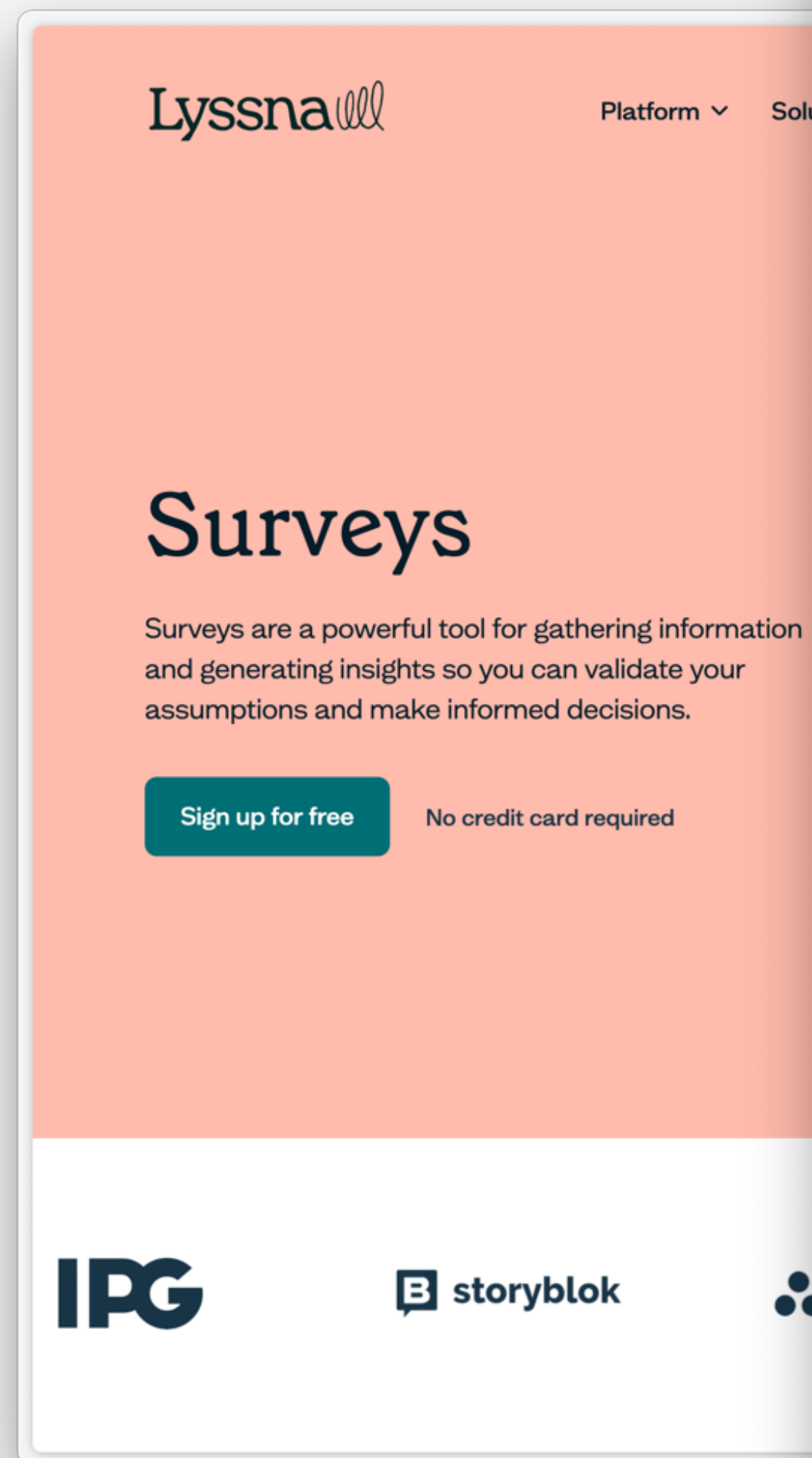
0



Run a semantic survey

A semantic differential survey can be used to see if the design matches the brand keywords you seek to communicate.

TESTING YOUR DESIGN CONCEPTS / TESTING AESTHETICS





Where would you click to signup for Frontend Masters

Click on the image to carry out the instructions or complete the set task



On a scale between formal and casual how would you describe this design?

Formal

Casual

1	2	3	4	5
---	---	---	---	---

Pass



Where would you click to signup for Frontend Masters

Click on the image to carry out the instructions or complete the set task



Which of the following words best describe this website?

Select some options below

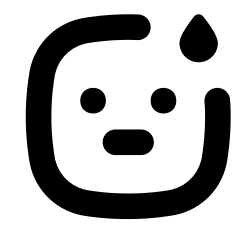
- Casual
- Formal
- Simple
- Complex
- Fun
- Serious
- Personal
- Impersonal

Pass

Testing usability

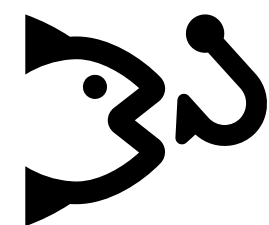
The earlier you begin usability testing in the project, the more benefits you will get from it.

Why test usability



Address concerns

Stakeholders may have concerns about the experience, and testing can address them.



Catch issues early

The earlier you catch usability issues, the cheaper it is to correct them.



Better product

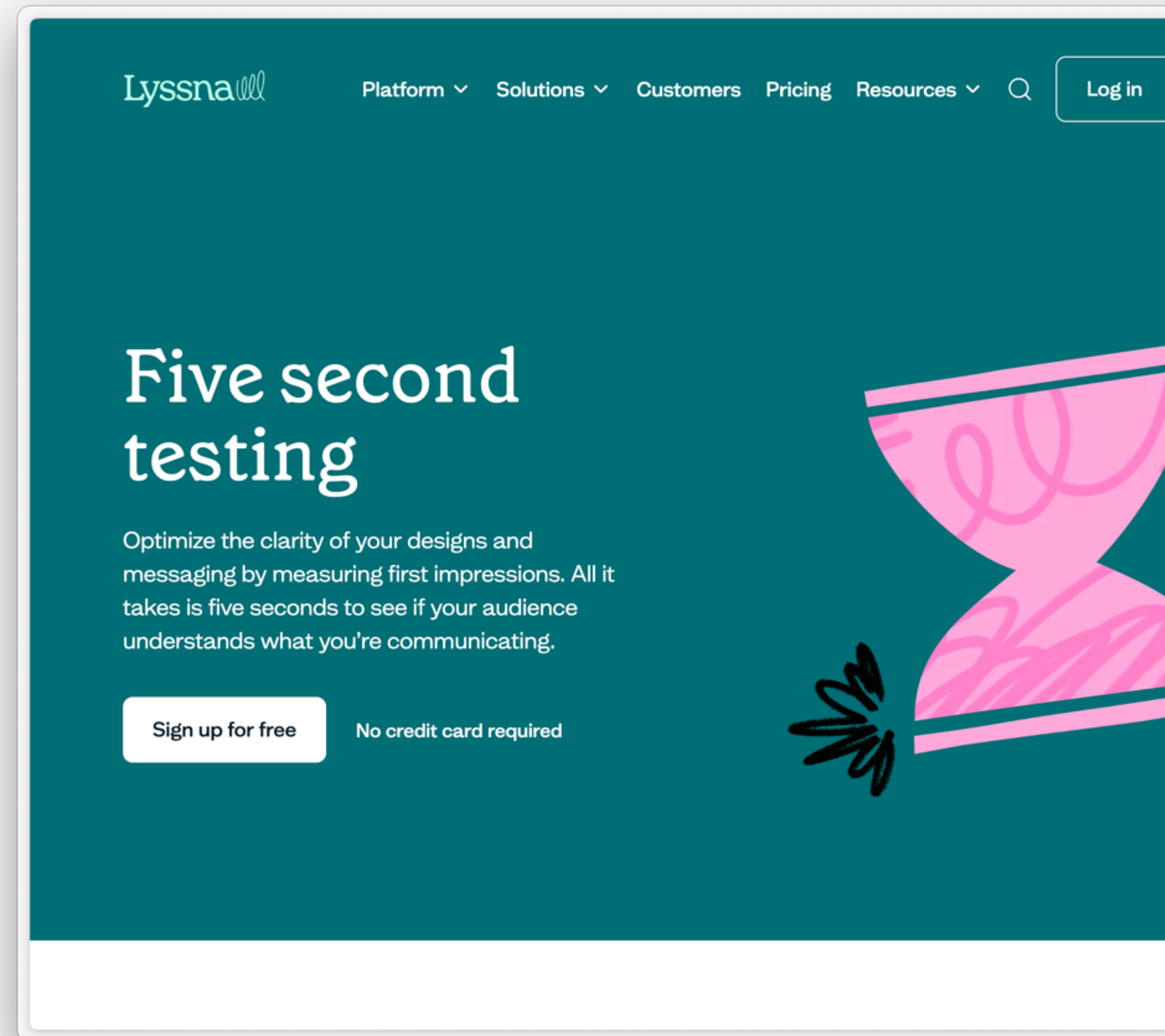
Testing early and frequently leads to a better product, fostering user loyalty.

Who to test with

If your audience doesn't have physical or cognitive impairments, you can conduct usability testing with anyone outside the organization who is unfamiliar with the digital service.

5-Second test

A **5-second test** involves showing users the design for only five seconds, after which they are asked to recall specific details or first impressions, assessing the clarity and effectiveness of its visual communication.



Lyssna

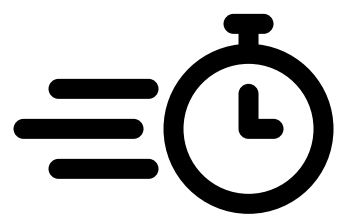
Platform ▾ Solutions ▾ Customers Pricing Resources ▾

Five second testing

Optimize the clarity of your designs and messaging by measuring first impressions. All it takes is five seconds to see if your audience understands what you're communicating.

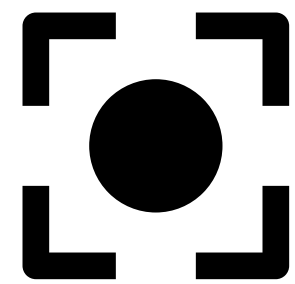
No credit card required

What are you looking for?



Did they get it?

Did they understand the interface and what they could do with it?



Did they see it?

Which elements on the page did they spot and did they see a particular action?

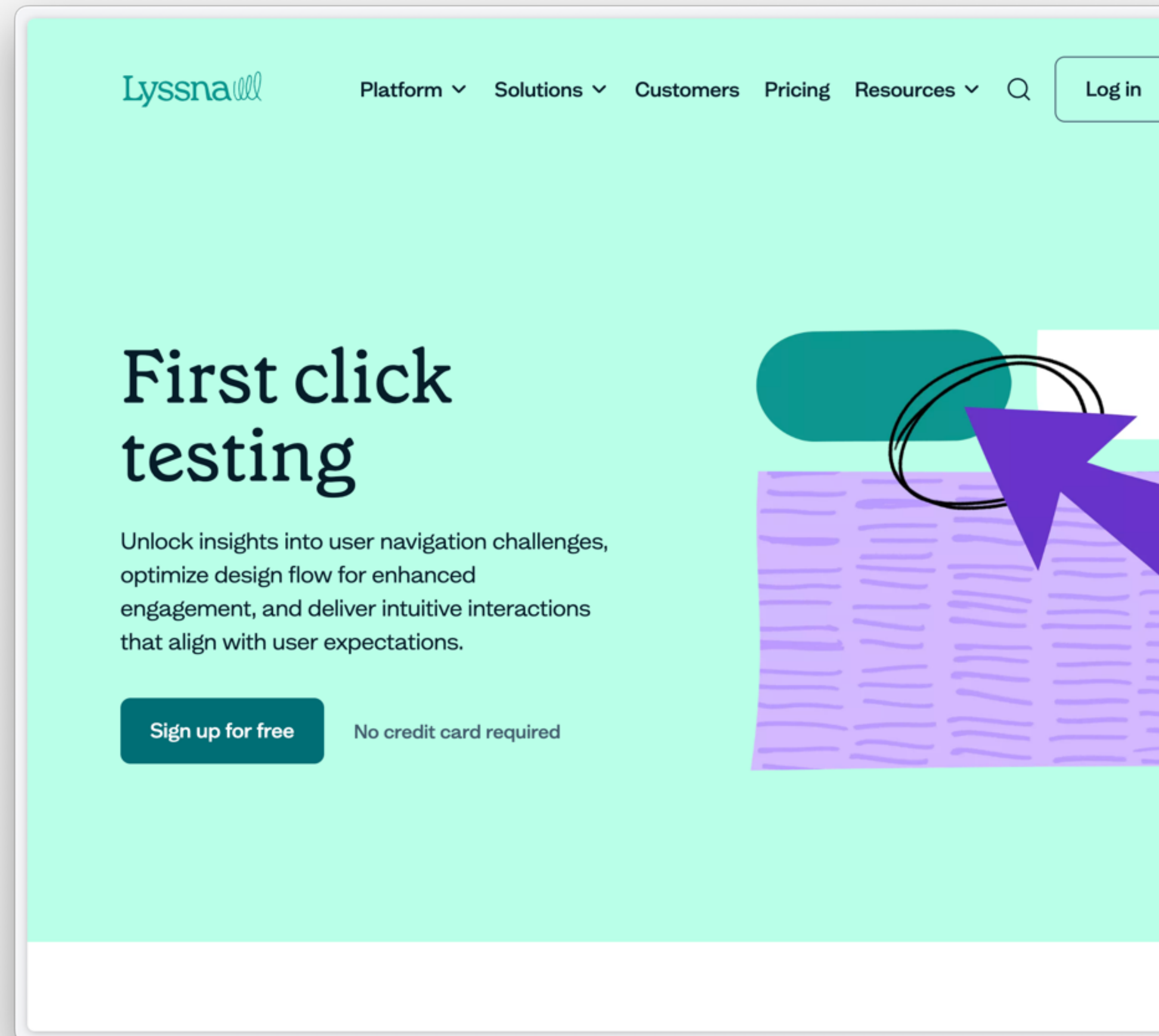


What stood out?

Which elements stood out more than others? Is that the right elements?

First Click Test

First-click testing is a technique that analyzes the initial click made by people using an interface.



Why first click testing?

If users get the first click was correct, they have an 87% chance of completing the action correctly, as opposed to just 46% if the first click was wrong.

“[First Click Usability Testing](#)” by Bob Bailey and Cari Wolfson

Welcome screen

1. First click

Thank you screen

1 to 2 mins

1 credit

Save and preview

Save and continue

Test details

Test name

First Click Test

Language

English

Project

Frontend Masters

Allow participation on

All devices

Mobile only

Desktop only

Welcome screen

Customize

Add a section

1. First click

Instruction (optional)

*****bold*****

Where would you click to signup for Frontend Masters

Design

Device frame

No frame



screenshot - Learn JavaScript React and TypeScript to Node.js Fullst...

Preview

Remove

Pixel density

Std-DPI

Follow up questions

Where would you click to signup for Frontend Masters

Click on the image to carry out the instructions or complete the set task

The image shows a screenshot of the Frontend Masters website. At the top, there is a navigation bar with the logo 'Frontend Masters' and links for 'Courses', 'Learn', 'Workshops', 'Blog', and 'Pricing'. On the right side of the navigation bar, there is a search icon, a 'Join Now' button, and a 'Login' link. The main content area features a large hero section with a dark background. On the left, there is a globe and a moon. On the right, there is a code editor showing JavaScript code. The main heading reads 'Your Path to Senior Developer and Beyond' followed by '200+ In-Depth Frontend & Fullstack Courses'. Below this, there are two buttons: 'Browse Our Courses' and 'View Learning Paths'. A dark banner below the hero section contains the text 'Join us live online! Testing Fundamentals on Mar 5, 2024. See Details'. Below the banner, there is a section titled 'Learn Practical Tech Skills from Experts You Can Trust' with a subtext 'With over 200 courses in JavaScript, React, and TypeScript to Node.js, Fullstack, and Backend'. This section includes a row of logos for JavaScript (JS), TypeScript (TS), a database icon, Node.js, CSS, React, Vue.js, and Angular. Below the logos, it says 'Popular Learning Paths: Beginner • Professional • Fullstack'. At the bottom left, there is a section titled 'Why Frontend Masters?' with a paragraph of text. At the bottom right, there is a partial view of another section titled 'What is'.

Frontend Masters Courses Learn Workshops Blog Pricing Join Now Login

Your Path to Senior Developer and Beyond

200+ In-Depth Frontend & Fullstack Courses

[Browse Our Courses](#) [View Learning Paths](#)

Join us live online! Testing Fundamentals on Mar 5, 2024. [See Details](#)

Learn Practical Tech Skills from Experts You Can Trust

With over 200 courses in JavaScript, React, and TypeScript to Node.js, Fullstack, and Backend

JS TS node CSS React Vue A

Popular Learning Paths: [Beginner](#) • [Professional](#) • [Fullstack](#)

Why Frontend Masters?

At Frontend Masters, we pride ourselves on offering courses designed and taught by leading experts actively employing their skills at renowned companies such as Netflix, Spotify, Google, and Stripe. Our curriculum is continually refreshed to align with the most

What is

Frontend Masters / First Click Test

Created 7 minutes ago by Paul Boag

Make variation set

Build Recruit Results 1

Filters Participants

Country

United Kingdom 1

Age range

Unknown 1

Sources

Self-recruited 1

1
Total participants

1
Responses shown

Share

Export 1 results as CSV

1. First click

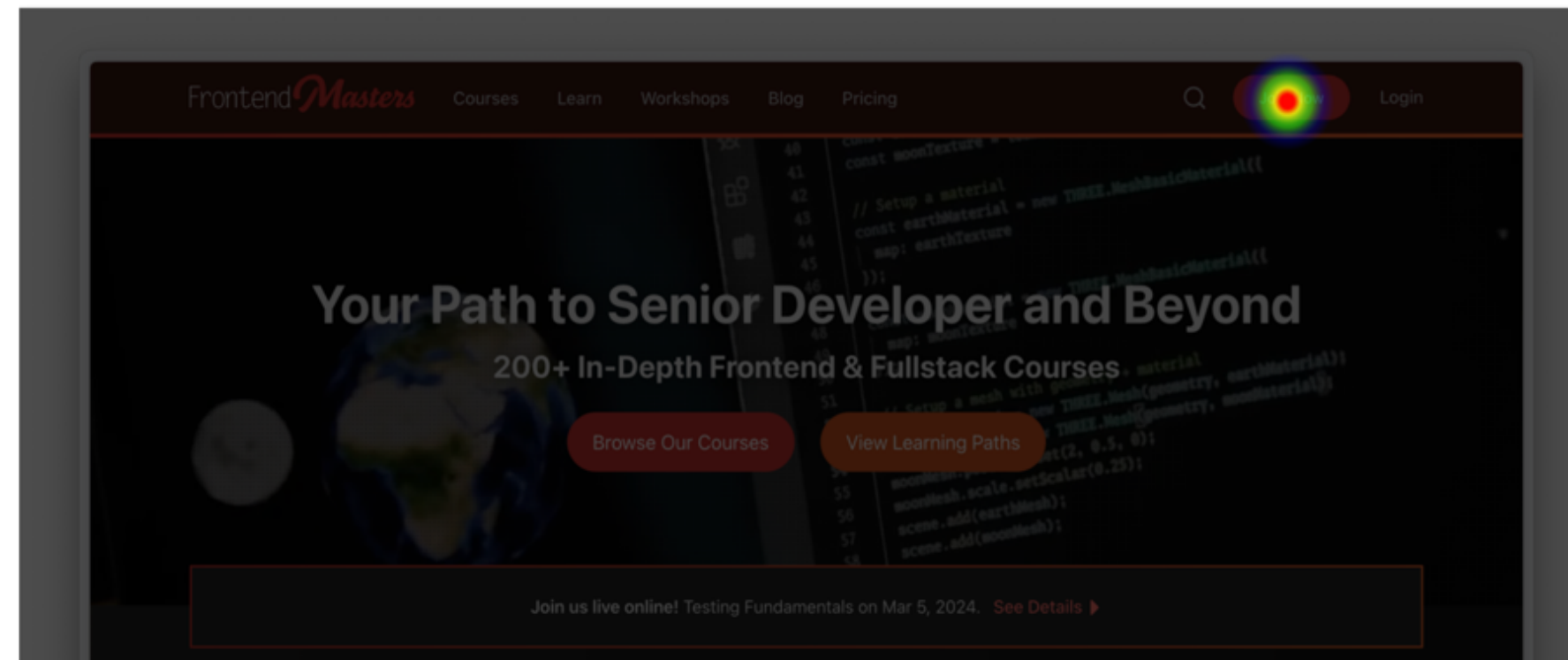
Where would you click to signup for Frontend Masters

Heat map

Click map

Image

Export heat map as image



Expand image



Other

3s

100%

1

Eye tracking

RealEye enables eye-tracking studies without special equipment, but it remains time-consuming and costly.

TESTING YOUR DESIGN CONCEPTS / TESTING USABILITY

contact@realeye.io +1 646 9803603

RealEye USE CASES PLATFORM ▾ PRICING FOR EDUCATION RESOURCES ▾

Online Research Platform with Webcam Eye-Tracking

See the platform's video overview

[Try For Free](#) [Launch Demo](#)

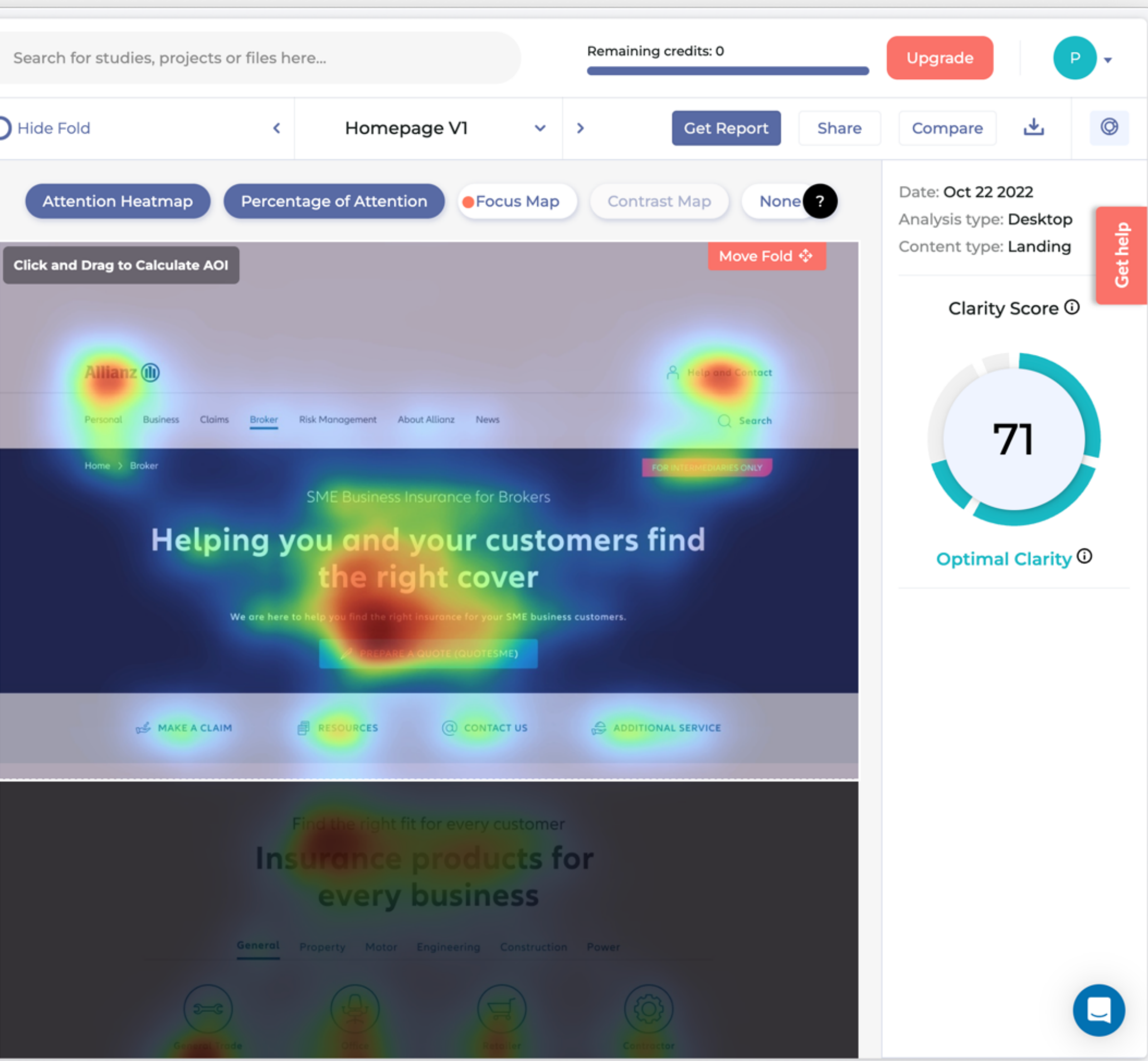
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P&G groupm Ipsos Stanford University SWPS University

RealEye 1 Study Setup 2 Contents Setup 3 Results

1. C European Funds Smart Growth



Eye Tracking simulation

Because eye-tracking is expensive and time-consuming, simulation software is often a more viable alternative.

I use [Attention Insights](#) to estimate where user attention will go.

Conclusion

Testing early brings considerable benefits.

Focus testing of design concepts primarily on aesthetics.

But, if possible, also test comprehension and usability.



Next

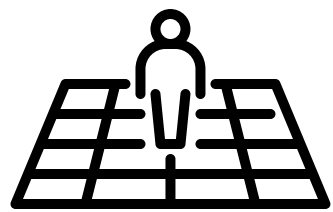
Testing Your Prototypes



Testing Your Prototypes

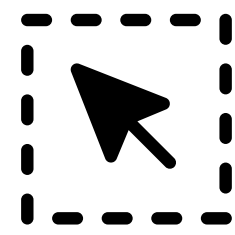
Prototypes provide the best opportunity to test the usability and effectiveness of any digital service you build.

Why bother testing with a prototype



Realistic

A prototype more closely represents the actual user experience, resulting in more realistic results.



Interactive

A prototype provides an opportunity to test how a user interacts with the service.

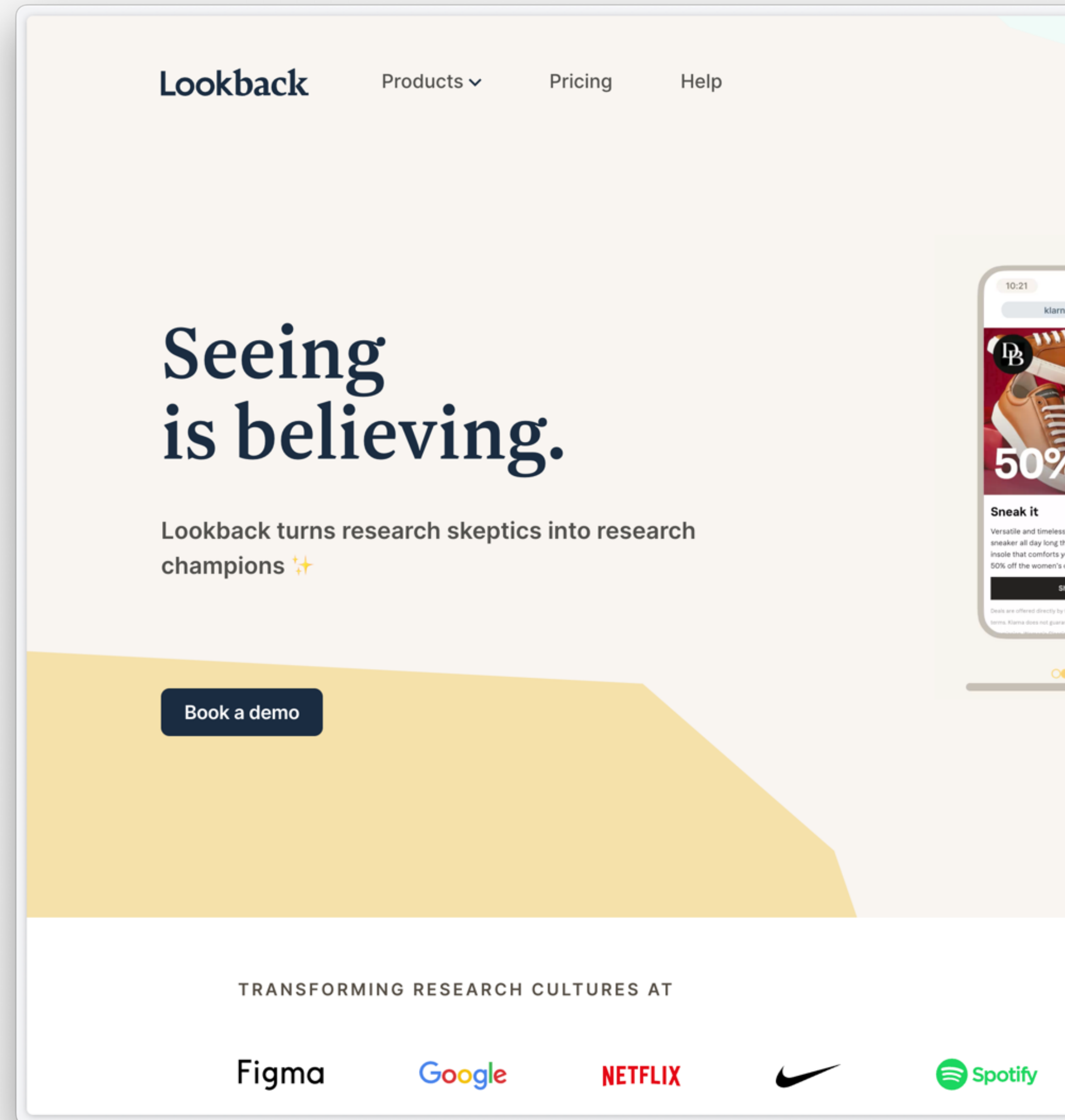


Longer journeys

A prototype allows you to test how users handle longer and more complicated journeys.

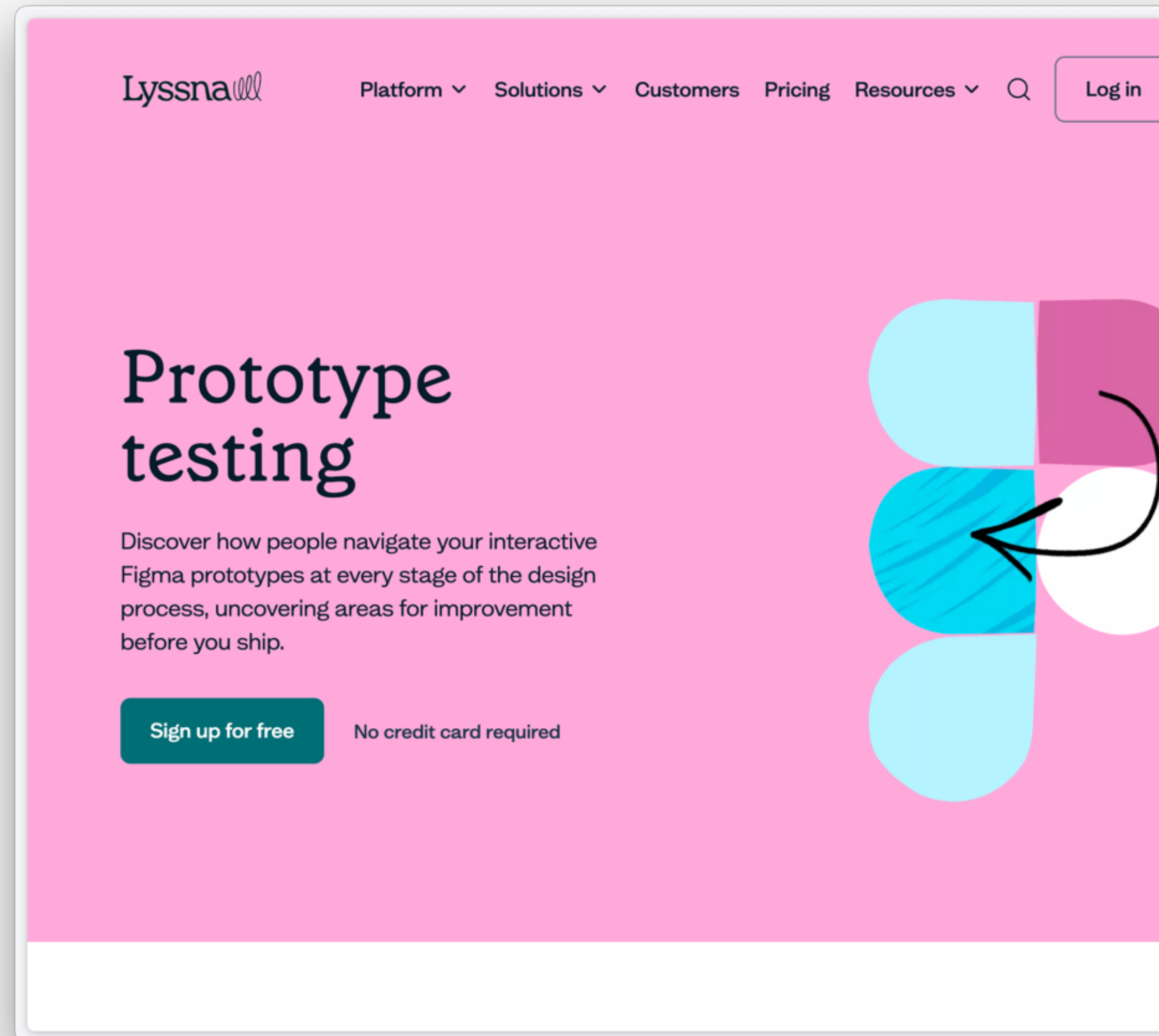
Facilitated testing

In facilitated testing, you guide the user through the tasks you wish them to complete, asking questions throughout the experience.



Unfacilitated testing

In unfacilitated testing, participants use the interface without a moderator guiding the session. However, they are encouraged to think out-loud during the interaction.



Facilitated vs Unfacilitated

Unfacilitated

- Easier to run.
- Increased numbers.
- More natural behavior.
- Faster results.
- **Better for 'is it working' testing.**

Facilitated

- Guided interaction.
- More adaptable.
- Easy clarification.
- Observable non-verbal queues.
- **Better for 'why isn't this working' testing.**

Remote Testing

- ✓ Broader Reach and Diversity
- ✓ Cost-Effectiveness
- ✓ Efficient Scheduling
- ✓ High Scalability
- ✗ Technical Issues
- ✗ Limited Control Over the Testing Environment
- ✗ Non-verbal Cues Are Harder to Interpret
- ✗ Potential for Distractions

In-Person Testing

- ✓ Richer Qualitative Feedback
- ✓ Controlled Environment
- ✓ Better Engagement
- ✓ Immediate Clarification
- ✗ Higher Costs
- ✗ Geographic Limitations
- ✗ Scheduling Challenges
- ✗ Scalability Issues

What to test

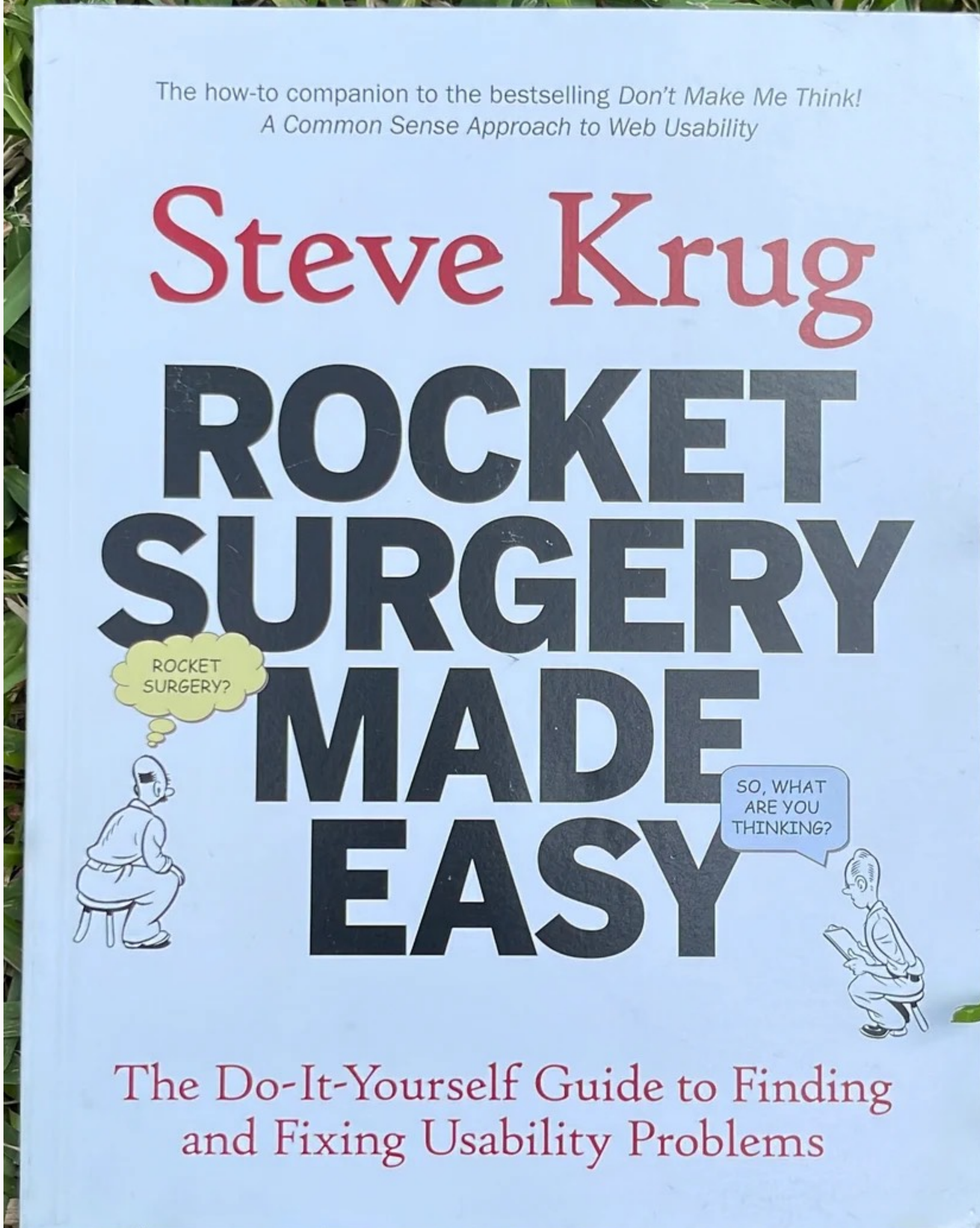
- **Ease of Use:** How easily can users navigate and understand the prototype?
- **Navigation:** Is the prototype easy to navigate? Are the navigation elements logically and consistently placed?
- **Learnability:** How fast can new users learn the prototype? Any confusing features?
- **Efficiency:** How efficiently can users complete tasks?
- **Satisfaction:** How likely are users to use the prototype as a real product?
- **Accessibility:** Test with screen readers, keyboard navigation, and other assistive technologies.
- **Content Comprehensibility:** Is the text content easy to read and understand?
- **Conversion Paths:** Identify any drop-off points or barriers to conversion.
- **Interactivity:** Test interactive elements for functionality, user-friendliness, and error handling.

Who to test

If you cannot simply gain access to your actual users, then testing anybody with comparable cognitive and physical abilities is normally enough.

How many rounds of testing to do

During the development of the service, consider **testing 3 people every month on the same day**. Test in the morning and then decide on what actions to take over lunch (preferably with pizza!)



Preparation

It is essential to take some time before running usability testing to be clear about what you want to achieve, how you will test and what you will say.

Practicalities

In-Person

- A quiet, private room
- An appropriate internet-enabled device
- A clock or watch
- The ability to take notes
- A screen recording app

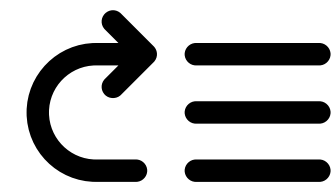
The screenshot displays the Lookback website interface. At the top, there is a navigation bar with the 'Lookback' logo, 'Products' with a dropdown arrow, 'Pricing', and 'Help'. Below the navigation bar is a large green circular icon containing a white smartphone. To the right of this icon, the text 'Usability Testing' is prominently displayed in a dark blue font, followed by the tagline 'Test your apps and websites with real users and get real insights.' in a smaller, grey font. The main content area features a central smartphone mockup showing the Klarna website. The phone screen displays the time '10:21', signal strength, and a 'klarna.com' browser address bar. The website content includes a 'Klarna.' header with a 'Log in' button and a menu icon, a 'Deals' section with an Adidas advertisement for 'Up to 50% off' on 'Active styles', and a 'Featured' section with a red product image. To the right of the phone mockup, there is a circular profile picture of a man. Further right, the text 'MODERATED USABILITY LiveShare' is visible. Below this, there is a video camera icon and the heading 'Talk with your participant face-to-face', followed by the description 'Discover how users experience your product from their perspective.' Below that is a hand cursor icon and the heading 'Touches, interactions and expressions', followed by the description 'Touch indicators on taps and gestures, audio, face cam—all so you can get a true picture of how your product works.'

Plan your tasks and scenarios



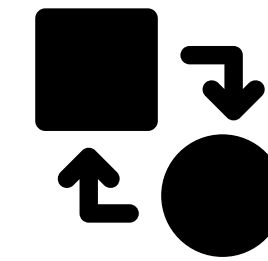
Identify

Start by identifying the tasks you want users to test based on the questions you have.



Prioritize

Prioritize the tasks, as you may not get through every task in a particular user session.



Transform

Turn your tasks into scenarios that a user can associate with.

How to transform a task

Task: Make an appointment to see a skin therapist.

Scenario: You're unhappy with the appearance of your skin lately and have decided to have a facial. You go to the website looking to book in a time for the treatment.

Prepare a welcome

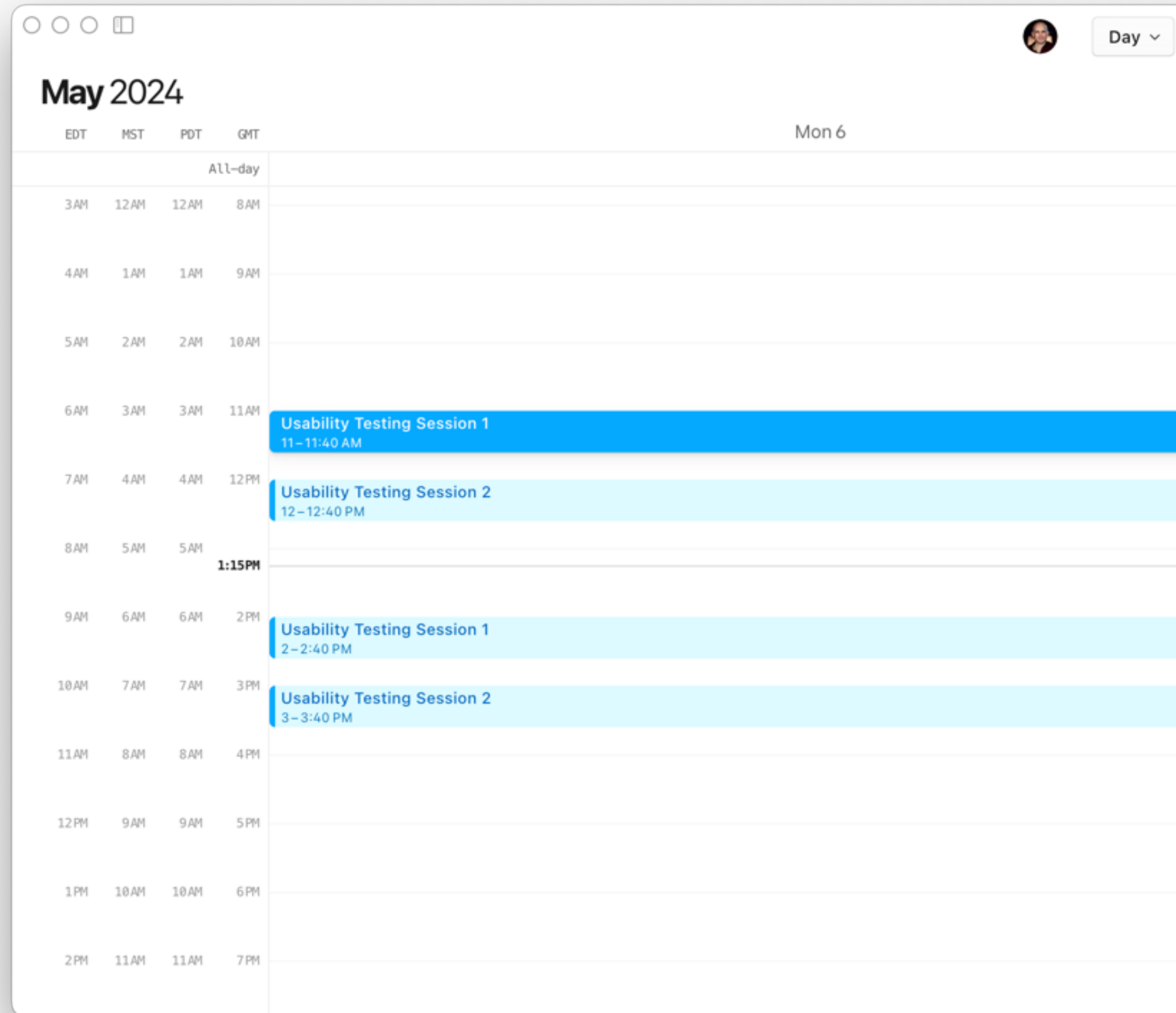
- Offer them refreshments.
- Introduce yourself and explain the session agenda and duration.
- Emphasize that you're testing the site, not the participant, so there are no wrong answers.
- Ask the user to think out loud: say what they see, are thinking about and are trying to do.
- Make it clear they are not going to offend anybody with negative comments.
- Ask permission to record them and stress that the recordings won't be used for any other purpose.
- Let them know if additional stakeholders are observing from another room.
- Ask if they have any questions.

How to run facilitated usability testing

Facilitated usability testing can be tiring and a little overwhelming when you start, so it is worth planning carefully.

Outline of a schedule

- 40 minutes long.
- 20 minutes apart.
- No more than 6 a day.
- Split over lunch.



Tips for testing

Try to relax people

Do not lead people

Watch for nonverbal cues

Ask about expectations

Allow people to struggle

Answer questions at end

Prompt people to talk

Prompt only if stuck

Ask clarifying questions

How to run unfacilitated usability testing

Unfacilitated usability testing is considerably easier to set up and run.

←
BACK

×

Start a round of research



Interview

MODERATED

- Web-based video or audio call
- Talk one-on-one and take timestamped notes



LiveShare

MODERATED

- Test apps, websites and prototypes
- See interactions, microphone, and camera



SelfTest

UNMODERATED

- Test apps, websites and prototypes
- Send basic instructions to your participants



Tasks

UNMODERATED

- Test apps, websites and prototypes
- Create step-by-step tasks for your participants

Next



Localisation

English (US)

Transcription (required)

Choose a language

Device requirements

Desktop

Extension-free Beta
Our new Desktop testing experience with nothing to install.

iOS

Android

Mobile browsers

Hide controls

Participant camera

Optional

Required

Disabled

Task order

Randomise

Session limit

Tasks Description, app version tested, etc.

✓ **Welcome message**
This message will be the first thing participants see before the session is started.

Aa

✓ **Scenario (required)**
Tell participants what their frame of mind should be before starting their first task.

Aa

Auto-open URL <http://example.com>

+ Add task

✓ **Final message**
This is the message participants will see upon completion of the session.

Aa





BACK

Start testing with participants

Lookback is flexible. Test with your own users or find some with our partners.

Participant Link

Send this link to participants and they will be able to start a session.

<https://participate.lookback.io/LMaLdr>

 Copy link

[Reset link](#)



Need participants?

[Learn about our participant partners and integrations](#)

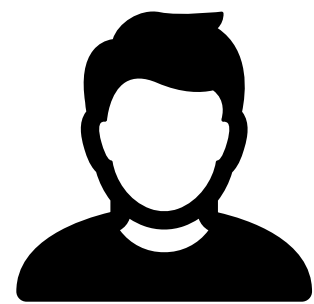
Done



Working with the results

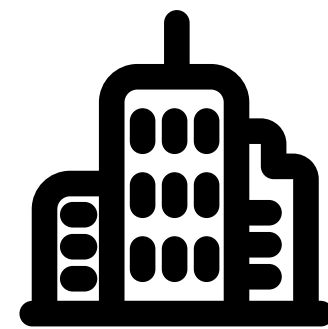
Usability testing is invaluable for informing and improving your work. But it is also a valuable tool for winning over stakeholders.

Prioritizing issues



User Impact

Start by categorizing issues based on their severity with a focus on "show stoppers."



Business Impact

Consider how each issue affects your key user goals and business objectives.



Effort

Some issues are quick fixes, while others require more time and resources.

Encourage attendance



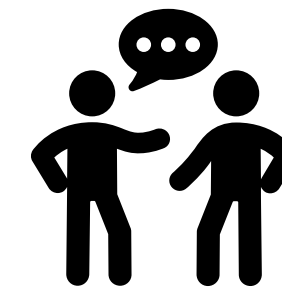
In-Person

People who attend sessions in-person usually are highly influenced.



Streaming

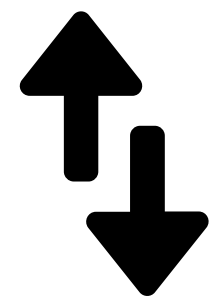
Consider streaming in your office so people can see it while they work.



Discuss

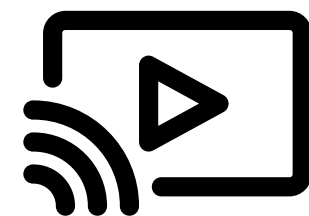
Attendees should be allowed to discuss what to do about the results.

Use the recordings



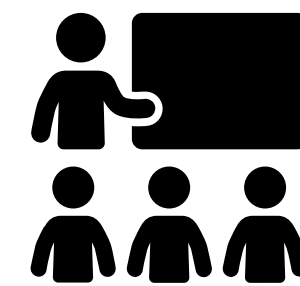
Highs and Lows

Identify the best and worst points in sessions and save them as usable clips.



Distribute

Create a summary video of these clips to distribute to stakeholders.



Present

Use clips regularly in presentations to justify your chosen approach.

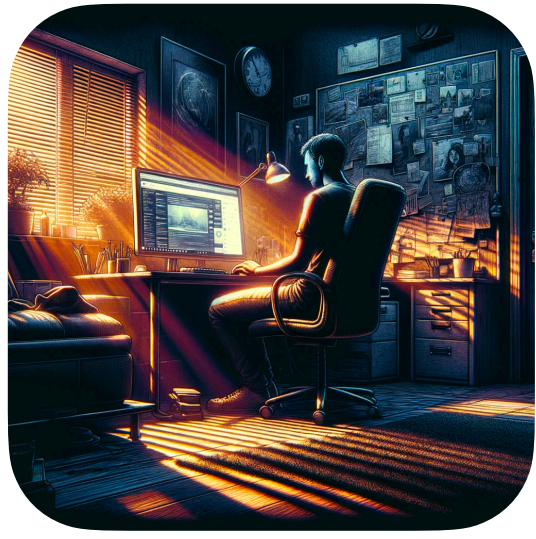
Conclusion

Prototyping probably provides the best opportunity to test.

Remote, unfacilitated testing is the fastest option.

Facilitated, in-person provides more significant insights if time allows.

Make sure you utilize the results not just to improve the service but to engage with stakeholders.



Next

Testing Existing Websites or Apps

Testing Existing Websites or Apps

Once a digital service is up and running, it gives us a great chance to see how people use it. This helps us learn a lot about how to make it even better.

Why post-launch testing and iteration are crucial to success

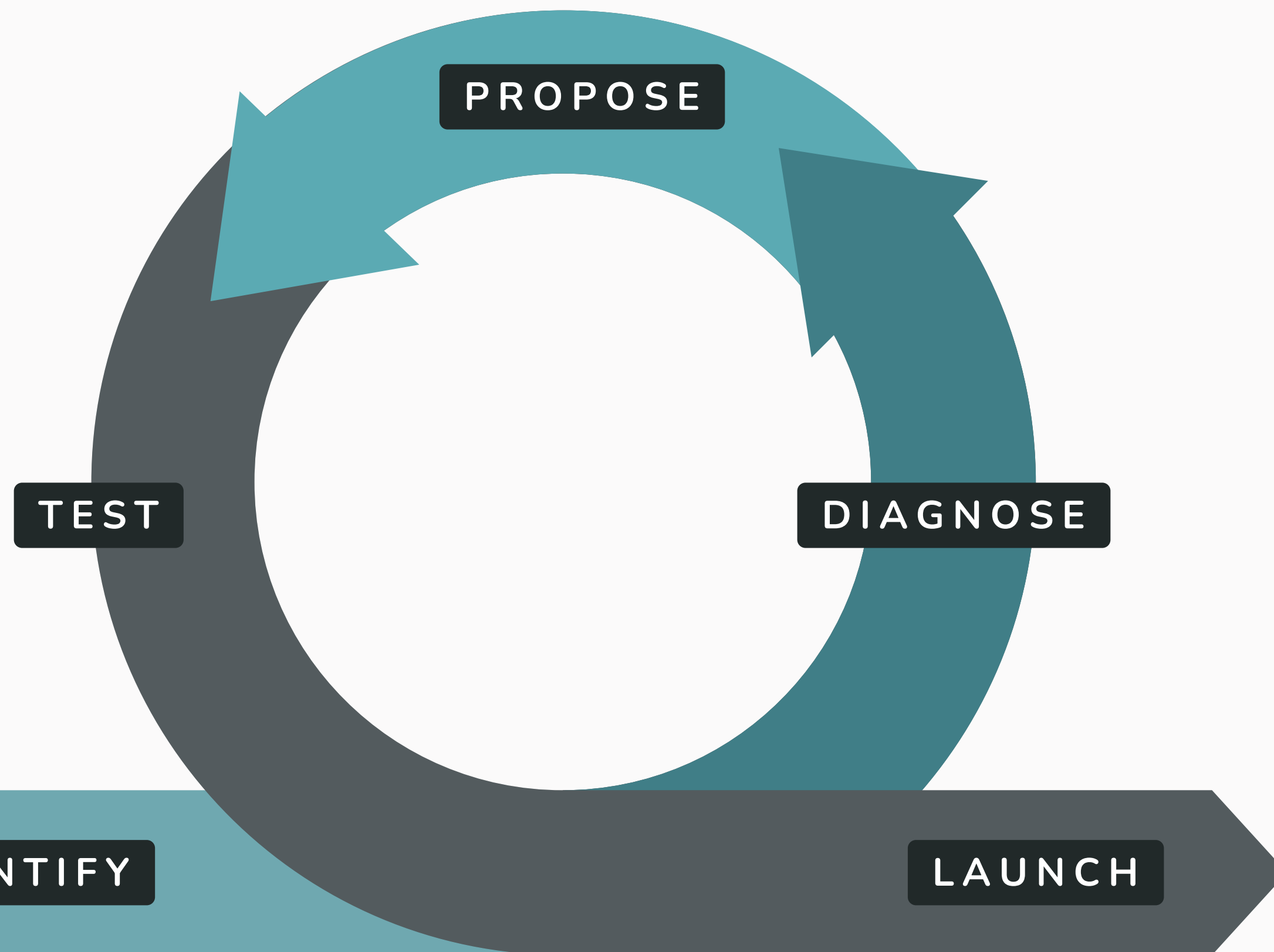
Natural Behavior at Scale

Once a digital service goes live, we can observe user behavior at scale.

Delivers Results

Post-launch optimization consistently delivers dramatically improved conversion and customer retention.

Post-Launch Process

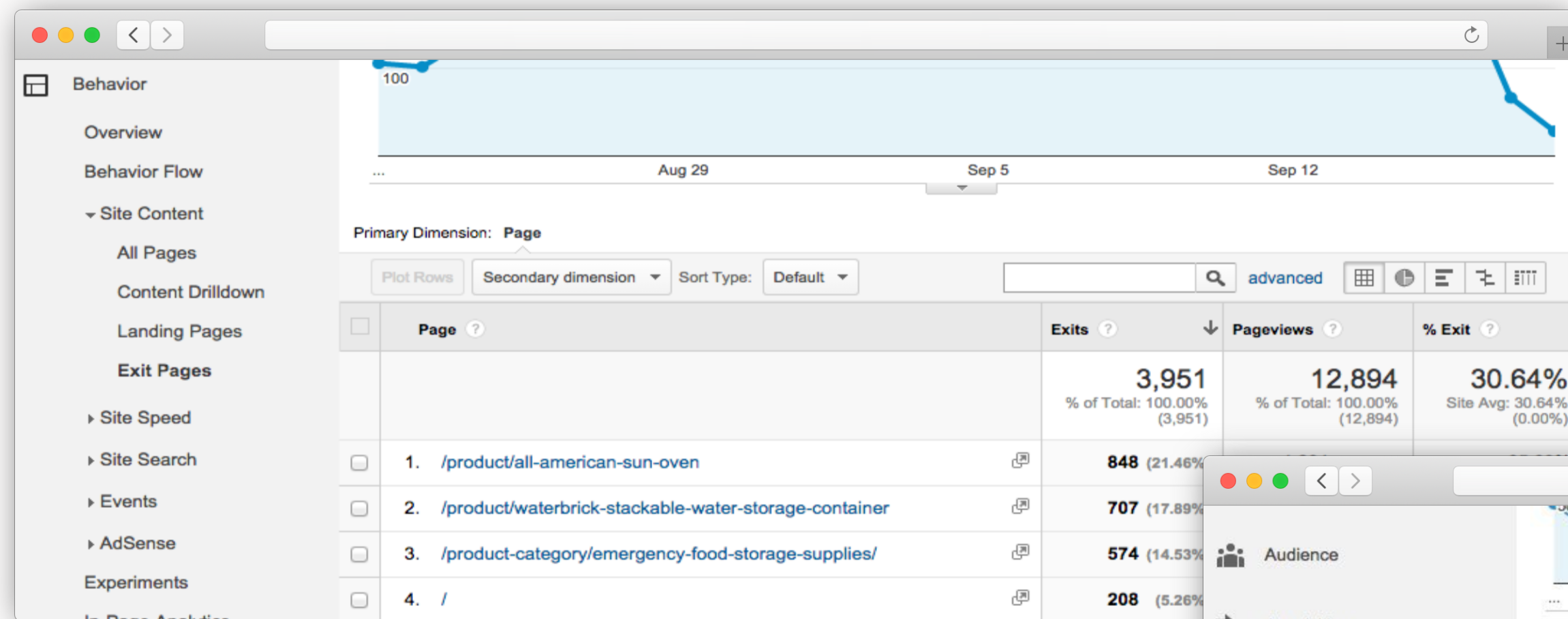


- Identify the top problem page.
- Diagnose the problem with the page.
- Propose one or more solutions.
- Test your solutions.
- Launch the best solution.
- Identify the next top problem and repeat.

Identifying points of friction

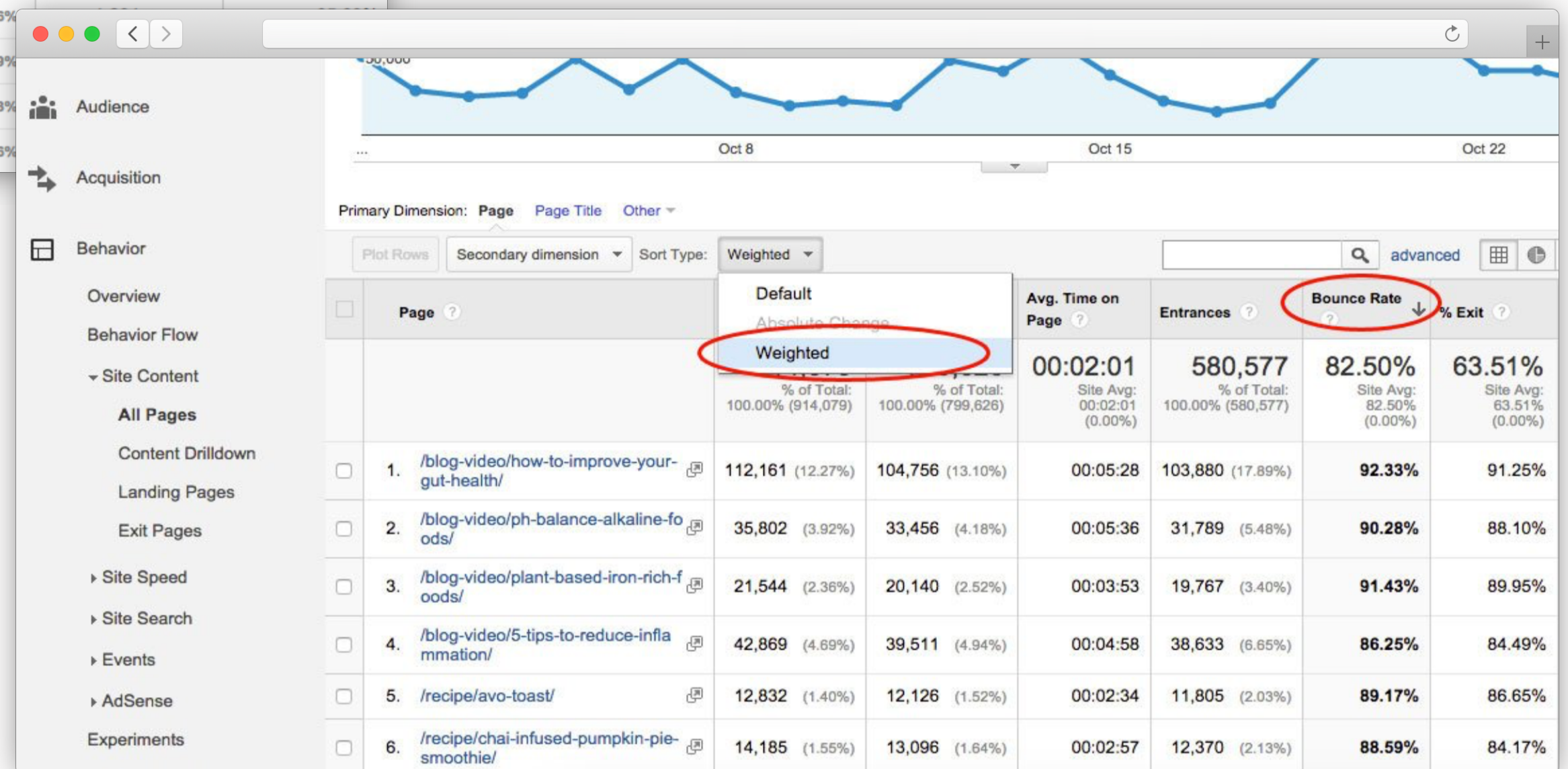
Before you can improve the experience you first need to identify under-performing pages and the specific points of friction on those pages.

Warning signs in analytics

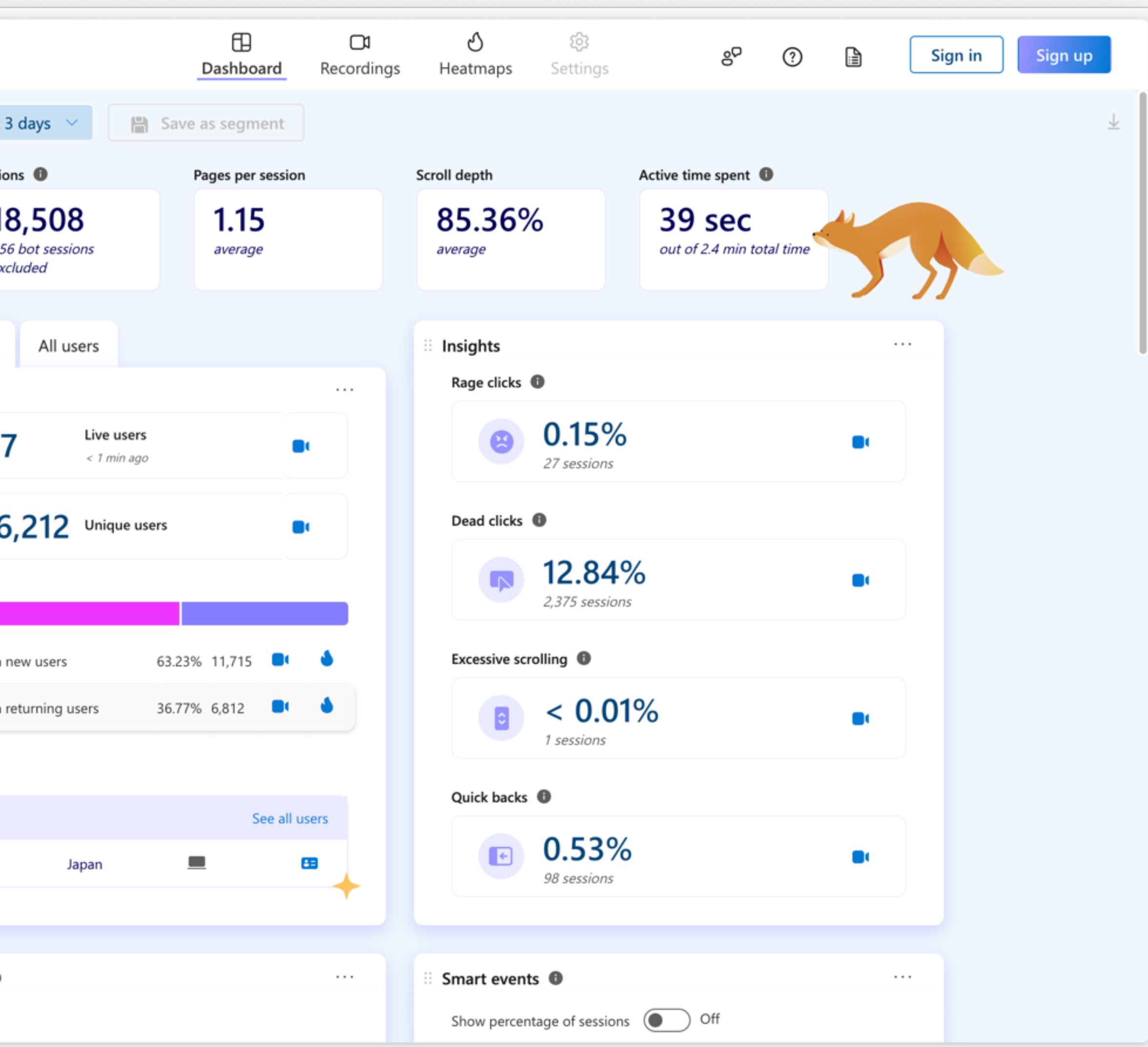


Exit pages

Bounce pages



TESTING EXISTING WEBSITES OR APPS / IDENTIFYING POINTS OF FRICTION



Other signs to look out for.

- Rage Clicks.
- Dead clicks.
- Excessive scrolling.
- Quick backs.

TESTING EXISTING WEBSITES OR APPS / IDENTIFYING POINTS OF FRICTION

Narrowing down the exact issue

- Heat maps.
- Session recordings.

The screenshot displays the Microsoft Clarity dashboard interface. At the top, there are navigation tabs for Dashboard, Recordings, Heatmaps, and Settings. A search bar shows a filter for 'Visited URL matches regex: ^https://clarity\.microsoft\.com/(.*)?\$', with options to 'Save as segment' and 'Clear'. Below this, there are controls for 'Filters', 'Segments', and 'Last 3 days'. A message states 'No live recordings found. Try removing some filters.' The main content area lists three session recordings with details such as entry/exit URLs, duration, clicks, pages, user ID, location, and device. A heatmap of a website is visible on the right, showing user interaction patterns. A 'Sign up with Clarity' modal is overlaid on the heatmap. At the bottom, there is a playback control bar for a session recording, showing a play button, volume, speed (1x), and a 'Skip inactivity' checkbox.

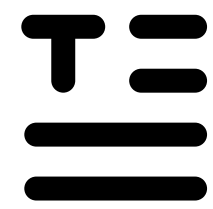
Testing smaller changes

If your solution involves a minor change, AB testing is the best way to test its effectiveness.

Test multiple solutions

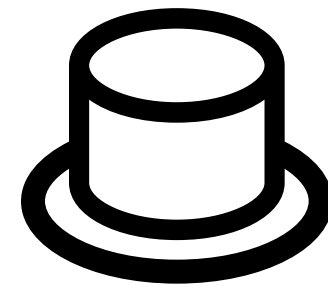


When to use AB testing



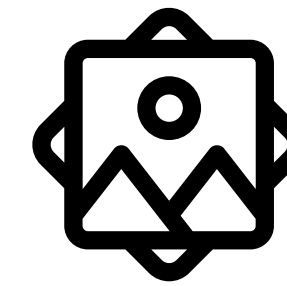
Changing text

Implementing and testing changes to headings, links, or copy can be done easily.



Changing buttons

Changing the styling or copy of buttons is often an effective way of addressing friction.

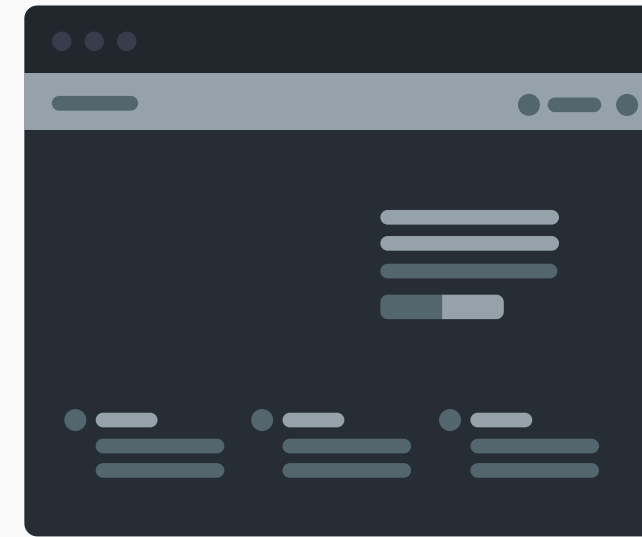


Changing images

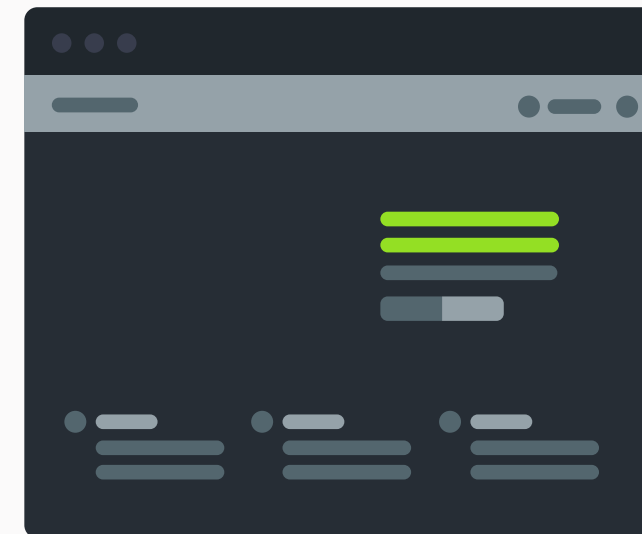
Images can distract or guide attention, so changes to images can have significant impact.

Change one or more elements at a time

A/B Testing

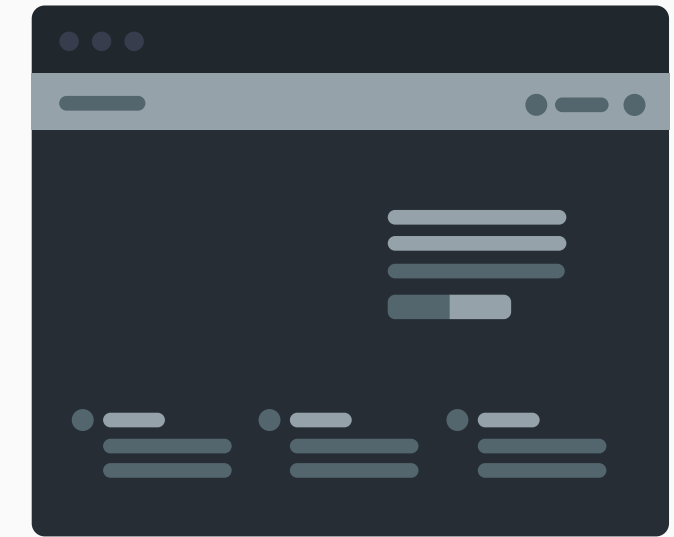


Original Version

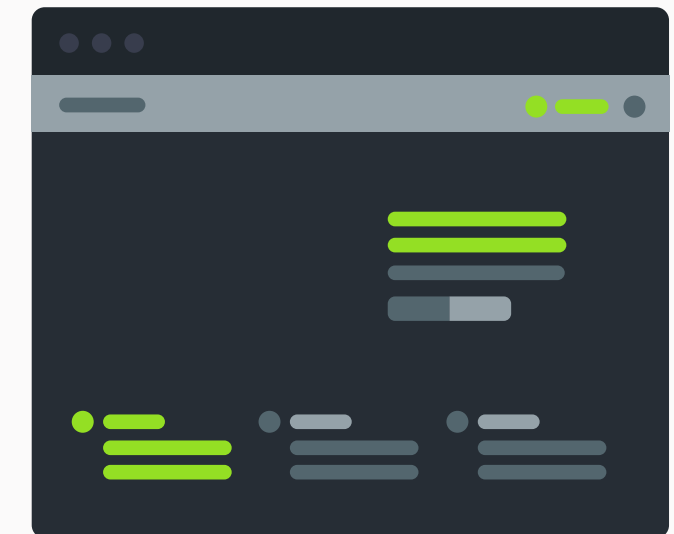


Variation with a single change

Multivariate



Original Version



Variation with multiple changes

TESTING EXISTING WEBSITES OR APPS / TESTING SMALLER CHANGES

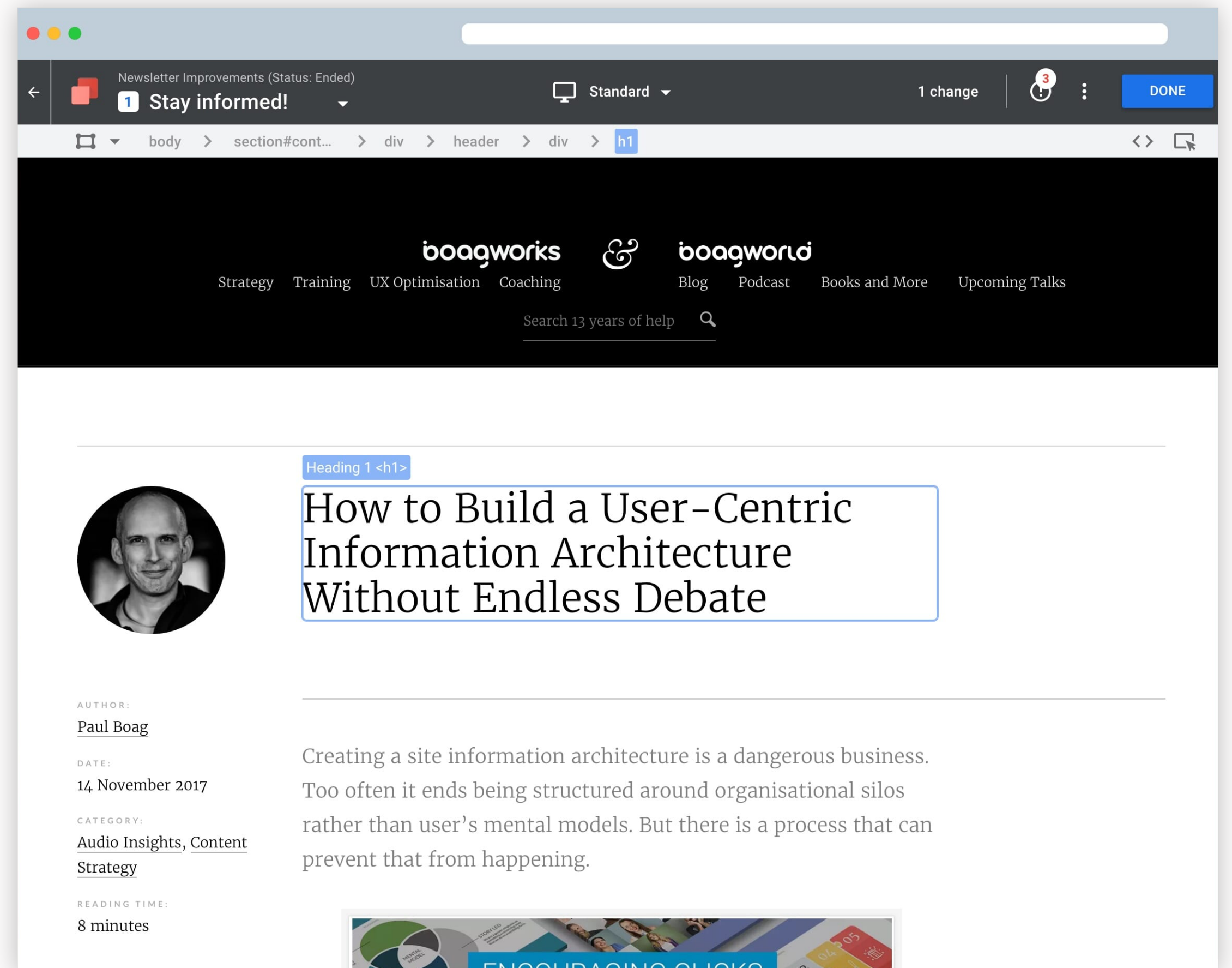
What tool to use

The screenshot shows the homepage for Convert, an A/B testing tool. The header includes the 'convert' logo, navigation links for Features, Pricing, For Agencies, Request a Demo, and Company, along with Login and Try For Free buttons. The main content area features the text 'Proven A/B Testing Tool' and 'Optimize for Better Site Experiences.' A prominent pink button says 'Start 15-Day Free Trial', with subtext 'No Credit Card Needed' and 'Fast Support During Trial'. Below this are logos for Sony, Audi UK, Virgin mobile, MANSCAPED, Cro Metrics, and speero by CXL. At the bottom, it states 'Convert Experiences: 40,000+ Sites Optimized Over 10 Years.' and 'Better Decision Making, Innovation & Growth - At Your Fingertips'. A footer note says 'Confidently run tests across all your growth channels with our thoughtfully designed features, in-depth onboarding, and 10x faster support.'

The screenshot shows the homepage for Crazy Egg, a website analysis tool. The header includes the 'crazyegg' logo and navigation links for Product, Customers, Solutions, Enterprise, and Log In. The main headline reads 'See what's wrong with your website.' Below this, a dark blue banner states 'Over 400,000 websites use Crazy Egg to fix their website.' and lists client logos: cnet, DELL, Etsy, INTUIT, and @optimizely. A central form asks for the 'Enter your website URL' with a 'Continue >' button. Below the form, it says 'Start your 30-day FREE trial • Cancel anytime'. A link at the bottom says 'Not ready to get started? Learn more'. On the right side, there is a grid of feature icons: Heatmaps, Recordings, Surveys, Errors, A/B Testing (highlighted with a dashed border), Traffic Analysis, CTAs, and Goals. Above the grid, there are two wireframe diagrams labeled v1 and v2.

How to use AB testing tools

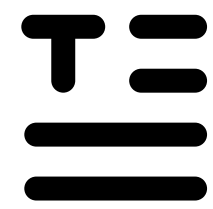
- Use a WYSIWYG editor to make simple changes to a page.
- For more ambitious changes redirect traffic to an alternative version.



Testing larger changes

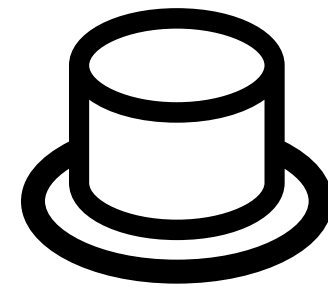
Not everything can be easily AB tested. In such situations, testing a prototype is the best option.

When to use prototyping



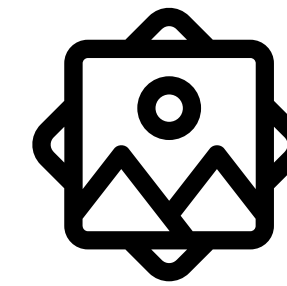
Multiple screens

If your solution involves changes across multiple screens, AB testing will struggle.



Complex interaction

You cannot quickly AB test changes to complex interactions without building them.



Costly build

To AB test, you need to build the changes, and that can prove costly in many situations.

TESTING EXISTING WEBSITES OR APPS / TESTING LARGER CHANGES

Test with usability testing

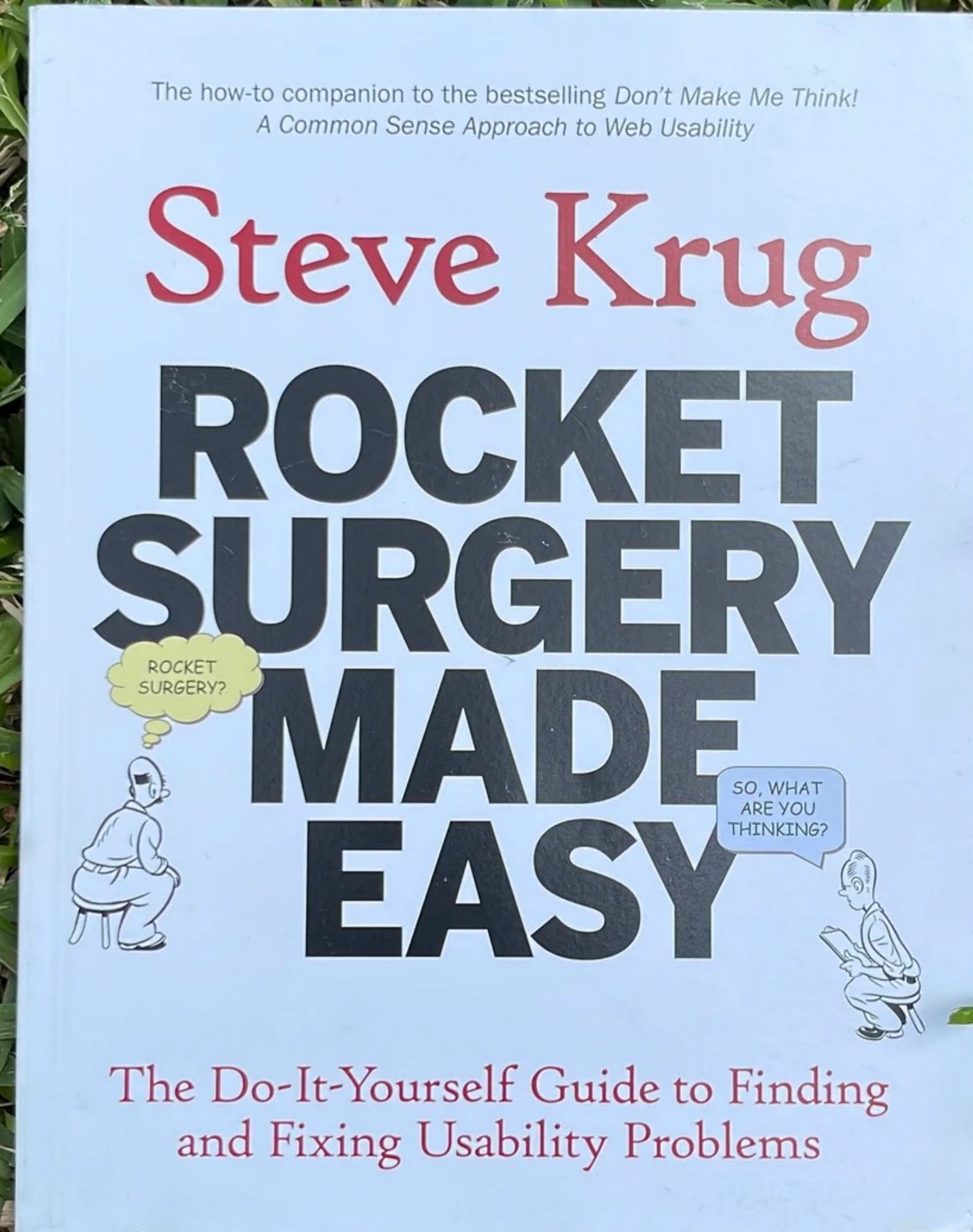
Facilitated

Unfacilitated

Remote

In-person

Seriously consider ongoing testing of three people one morning every month.



Rinse and repeat

After fixing one problem, revisit your analytics to identify the next page with the highest bounce and exit rates.

Conclusion

Post-launch testing and iteration are invaluable.

Have a prioritized backlog of friction points you add to regularly.

For more minor fixes use AB testing.

For larger fixes, prototype and test first.

Fast and Budget-Friendly User Research and Testing

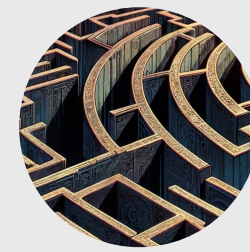
I genuinely want to help, so email me anytime to paul@boagworld.com.



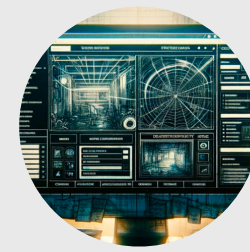
Principles



User Research



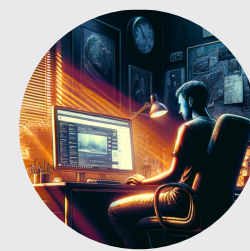
Architecture



Design Comps



Prototypes



Existing Services