Checklist for Preparing a Usability Test

How to Use This Checklist

1. **Print or Download**: Use the checklist digitally or print it for real-time tracking.
2. **Follow Each Step**: Complete each section to prepare thoroughly, marking tasks as you go.
3. **Add Notes**: Jot down specifics, like participant details or objectives, if needed.
4. **Track Progress**: Follow the order or adjust it to fit your project; use the checklist to stay organised.
5. **Final Review**: When all steps are checked, do a quick review to confirm everything is ready.

Check out our full tips on using this checklist here.

☐	Task	Details
☐	**Define Objectives and Goals**	Clearly outline what you want to learn from the usability test. Identify specific areas to focus on, like navigation, task flow, or ease of use. Example Goal: "Ensure users can quickly locate and complete the checkout process without issues." Well-defined objectives help guide the entire testing process.
☐	**Recruit Participants**	Find participants who match your target audience by considering demographics, experience levels, and familiarity with similar products. Aim for 5-10 participants per round for a balance between depth of insight and manageable data. Tip: Use recruitment tools like User Interviews or post in niche communities to find participants who closely resemble your user base.
☐	**Select Testing Method and Format**	Choose the method that best suits your needs—moderated, unmoderated, remote, in-person, or guerrilla testing—based on factors like budget, time, and goals. Example: "Select remote, unmoderated testing to gather quick insights from a broader audience in a natural setting." Each method provides different insights, so align your choice with your objectives.
☐	**Prepare User Scenarios and Tasks**	Develop realistic, goal-oriented tasks that reflect actual user intentions. Example Task: "Find a red dress in size M and add it to your cart." Structure tasks to cover key interactions without overwhelming users, and keep tasks concise to maintain focus.
☐	**Create a Test Script and Set Up Key Metrics**	Write a script that includes a clear introduction, task instructions, and follow-up questions. Define key metrics like Task Success Rate, Time on Task, Error Rate, and User Satisfaction to measure performance objectively. The script keeps sessions consistent and ensures you collect relevant data.
☐	**Prepare Follow-Up Questions for Participants**	Develop open-ended questions to gather qualitative feedback after each task, such as "What was the most challenging part of completing this task?" and "Is there anything you would change to make this experience easier?" Follow-up questions help uncover insights beyond task completion.
☐	**Set Up Equipment and Testing Environment**	Set up all necessary recording and tracking tools, such as screen-sharing software for remote tests or cameras for in-person sessions. Test all equipment beforehand to ensure smooth sessions without technical interruptions.

☐	**Conduct a Pilot Test**	Run a small test with a colleague or one participant to identify any potential issues with tasks, instructions, or technology. Adjust unclear instructions or scenarios based on pilot feedback to ensure the main test runs smoothly.
☐	**Ensure Documentation and Note-Taking Process**	Create a structured approach to recording observations, using notes, screenshots, or screen recordings. If you have multiple observers, designate one as the primary note-taker to avoid overlapping notes or distractions for the participant.
☐	**Brief Observers on Best Practices**	Limit the number of observers physically present with the participant, to prevent distractions for the participant. Typically, one or two observers in the room is enough. Remind observers to stay neutral and avoid influencing participants with body language, nodding, or verbal cues. This ensures that observations reflect the participant's natural behaviour.

At Keep It Usable, we specialise in moderated usability testing, with years of experience helping top brands like BBC, Nandos, and Vodafone create user-friendly digital experiences. This checklist is designed to streamline your usability test preparation. Whether you're testing a new app, website, or software, we're here to support you with proven methods that drive real results.