

## 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](#).

<input type="checkbox"/>	Task	Details
<input type="checkbox"/>	<b>Define Objectives</b>	Clearly outline what you aim to learn from this test (e.g., test feature intuitiveness, understand user pain points). Prioritise key questions or hypotheses you want to explore.
<input type="checkbox"/>	<b>Recruit Participants</b>	Identify the target users who reflect your audience’s demographics, experience level, and behaviours. Decide on the number of participants (5–10 is typical for qualitative tests).
<input type="checkbox"/>	<b>Select Testing Method and Format</b>	Choose a Testing Method: Decide between moderated (guided by a researcher) or unmoderated (self-guided) testing based on your objectives. Select the Format: Determine if the test will be conducted remotely or in person, and consider specific requirements like screen sharing or recording tools.
<input type="checkbox"/>	<b>Create Scenarios and Tasks</b>	Write realistic scenarios that mirror real user goals (e.g., “Find and purchase a product”). Keep tasks clear and relevant, and avoid leading participants toward desired actions.
<input type="checkbox"/>	<b>Create a Test Script</b>	<b>Introduction:</b> Begin with a brief introduction for participants. Explain the purpose of the test, what they’ll be doing, and reassure them that the goal is to test the product, not their skills.
<input type="checkbox"/>		<b>Task Descriptions:</b> Write out each task clearly. Use simple, action-oriented language that reflects real-life use cases. For example: “Find and add a specific product to your cart.”
<input type="checkbox"/>		<b>Follow-Up Questions:</b> Prepare follow-up questions to gather participants’ thoughts after each task. Examples include: <ul style="list-style-type: none"> <li>• “What did you expect to happen?”</li> <li>• “Was anything confusing or frustrating?”</li> </ul>
<input type="checkbox"/>	<b>Set Up Key Metrics</b>	Define the metrics that will provide the most insightful feedback about user experience and feature usability. Common user testing metrics include:
<input type="checkbox"/>		Feature Discovery Rate: Tracks whether users can find and understand essential features on their own, highlighting any discoverability issues.
<input type="checkbox"/>		Feature Engagement: Observes which features users interact with most frequently, identifying those with high perceived value and usability.
<input type="checkbox"/>		First Impressions: Captures initial reactions to the product’s design, layout, and functionality, helping gauge visual appeal and initial usability.

<input type="checkbox"/>		Retention Rate: Measures whether users are likely to return over time, indicating long-term satisfaction and engagement with the product.
<input type="checkbox"/>		Ease of Learning: Evaluates how quickly users pick up a new feature or function, useful for assessing intuitiveness and reducing learning curves.
<input type="checkbox"/>		User Effort and Frustration: Uses self-reported scales to understand the level of effort or frustration users feel while completing tasks, pinpointing complex or confusing areas.
<input type="checkbox"/>		User Preferences and Suggestions: Collects qualitative insights on what users like, dislike, and suggest for improvement, guiding feature updates based on user feedback.
<input type="checkbox"/>	<b>Organise the Script and Metrics for Easy Reference</b>	Arrange tasks and follow-up questions in a checklist format for quick access during the session.
<input type="checkbox"/>		Include a section to record each metric after each task, allowing you to capture data efficiently in real-time.
<input type="checkbox"/>	<b>Set Up Equipment and Testing Environment</b>	Ensure all necessary equipment is ready, including recording and screen-sharing tools. Test technology in advance to avoid issues during the actual sessions.
<input type="checkbox"/>	<b>Conduct a Pilot Test</b>	Run a trial test with one participant to check for any flaws in tasks, clarity of instructions, or technology issues. Make adjustments as needed to optimise the experience.
<input type="checkbox"/>	<b>Ensure Clear Instructions for Observers</b>	If you have team members observing, make sure they know not to interfere or influence the participant. Limit the number of observers to minimise pressure on participants
<input type="checkbox"/>	<b>Final Pre-Test Checklist</b>	Verify all tools are set up (recording, screen sharing, etc.). Confirm participant schedules and ensure they understand the format and any technical requirements (for remote tests). Ensure all documents, notes, and metrics forms are ready for quick data capture during the session.

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.