

# **Remote Usability Testing – Powerful Tool to Understand Your Users**

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## **Abstract**

Understanding your users and how they utilize your services on your website and/or portal is critical in communicating your value to your organization. There are various methods to support this effort. One method is remote usability testing. It is a powerful method to understand your users that can be done with minimal coordination. Remote Usability Testing allows a library to virtually observe users from various locations using its services on the website and/or portal. Participants can take it anywhere and at any time. Remote usability testing also provides flexibility to test users and acquire feedback quickly thus enabling the library to make informed decisions on updating the website/portal and/or services. Testing can also be a cost-effective method for selecting proposed services or committing to website updates just by testing mockups with users. For libraries, testing also allows them to observe how users view the library and its services and may inspire changes to services and outreach.

This paper discusses the benefits of conducting remote usability testing and how it will help your library communicate its value to your institution. It also provides an overview of the various remote usability testing approaches and products available. Lastly, this paper outlines best practices for setting up your own remote usability testing.

## **Introduction**

As librarians and information professionals, it is critical to understand our users and how they use services and resources. Without this knowledge, you are throwing darts at what your users need and expect. It puts you in position of making decisions without key facts and unable to adapt your website and services to meet your users' expectations. There are a variety of user research methods that can be used to acquire these facts. Remote usability testing is a user research method whereby usability testing can be conducted virtually, anywhere and at anytime. It is an effective way to deepen your insight into your users. This paper will address: a.) why remote usability testing should be a part of every librarian and information professional's user research toolkit, b.) what products/services are available to build a remote usability test, and c.) how to setup and launch a remote usability test.

## **Remote Usability Testing Overview**

Remote usability testing allows you to conduct usability testing virtually. It provides flexibility

for acquiring knowledge about users. Testers have a greater pool of users to recruit participants without incurring significant expenses. Staff is able to observe how users use the website or services anywhere and at anytime. A participant can take the test anywhere as long as s/he has access to a computer and an internet connection. Testing can be conducted with web conferencing software, screen sharing software, or remote usability testing software. Remote usability testing can be used to test:

- websites (yours or competitors)
- wireframes/prototypes
- services
- workflows
- devices
- iOS and Android applications

Remote usability testing can be moderated or unmoderated. Moderated remote usability testing is similar to traditional moderated in-person usability testing with one key difference - the moderator and participant are in separate locations. With unmoderated (or also referred to as automated) remote usability testing, the participant can take the usability test anywhere and at anytime. The session is recorded and once complete it is available for the person conducting the test to review.

Moderated remote usability testing benefits:

- observe participants in real-time and address any questions that participants may have
- prompt those participants to speak aloud their thoughts
- probe participants' responses to gather more insight

Moderated remote usability testing challenges:

- increase chance of bias responses from participants

Moderated remote usability testing should be used for testing:

- complicated features of a website or resources
- features or designs that an institution does not want available to the public
- focused on gathering qualitative data
- testing with a small group of participants

Unmoderated remote usability testing benefits:

- minimal coordination; simply setup your test and send it to participants
- ability to test with a greater number of users
- faster turnaround time in receiving feedback

Unmoderated remote usability testing challenges:

- Increase chance of participant not completing session. This challenge can happen for several reasons including
  - Technical issues
  - Ambiguous testing instructions, questions, or tasks
- Unable to encourage a participant to think aloud or probe a participant's response

Unmoderated remote usability testing should be used for testing:

- when there is a time constraint and results are needed quickly
- with a large sample
- focused on gathering quantitative data

## Software to Use

There are a variety of software you can use to conduct remote usability testing. The following sections are examples of that variety.

### Moderated Remote Usability Testing Software

To conduct moderated remote usability testing, you can use screen sharing functionality available with [Skype](#) and [Join.me](#). This functionality is available in the free and paid versions of both products. Web conferencing software such as [GoToMeeting](#), [Cisco WebEx](#), [Skype for Business](#) offer screen sharing, recording, and chat capabilities. These products also offer video capability that allow the moderator and the participant to see each other throughout the session. Enabling video allows the moderator to see the participant's facial expressions for additional insight.

### Unmoderated Remote Usability Testing Software

There are a variety of unmoderated remote usability testing products. When evaluating these products consider the following questions:

1. What kinds of tasks can be tested with the product?
2. Can the product support think-aloud and/or written responses?
3. Does the product support localization?
4. Does the product allow you to specify screener (participant) requirements?
5. What are your options for choosing participants? Can you recruit your own participants? Or must you use the product's recruiting panel?
6. What metrics are tracked?
7. Can you download session videos? Can the participant's voice be heard in the session recordings?
8. Does the product allow you to create a highlight clip of a session video(s)?
9. Does the product require the participant to install anything on his/her computer?
10. What is the turnaround time to access a session recording?

### One Stop Shop Unmoderated Remote Usability Testing Software

There are several one stop shop unmoderated remote usability testing products. The following list highlight three products.

[UserTesting.com](#) is a one-stop shop remote usability testing product. The software allows you to setup the usability test, define your screener requirements, choose to recruit your own participants or use its panel based on your screener requirements. You can also choose to have

the test moderated by a usertesting.com staff member. If you choose unmoderated testing, then you can send your participants a link to take the test at anytime. Usertesting.com records the participant's screen and audio. Throughout testing, the participant will be promoted to speak aloud his/her thoughts. Once the session is complete, you will be notified that the recording is available for viewing and download. While viewing the session, you can enter notes within the usertesting.com player and download the notes along with other information collected during the participant's session. The product also allows you to create a highlight clip of a key point in the session. Pricing is not available on website.

[UserZoom](#) is another one-stop shop unmoderated remote usability testing product. It has many of the features that usertesting.com offers such as ability to recruit your own participants or use its panel. It also has the ability to setup usability tests and record the participant's screen and audio. As with usertesting.com, you can annotate while viewing the session and create a highlight clip. UserZoom also offers the ability to create surveys, track customer feedback, setup card sorts and etc. The product has integrations with several products including Google Tag Manager and Google Analytics. It also works with [Knowbility](#), an accessibility consulting firm, for recruiting participants with disabilities and/or use an assistive technology. Pricing is not available on website.

[Loop11](#) is another one stop shop unmoderated remote usability testing product. As with the other two products, this product allows you to set up testing and recruit your own participants. It also supports integrations with products such as WordPress and Google Tag Manager. It also has a relationship with [Knowbility](#). Unlike the other two products, Loop11, does not have its own recruiting panel and does not record participant's voice. Pricing starts at \$199 per month.

### **Additional Unmoderated Remote Usability Testing Software**

The following list are additional examples of unmoderated remote usability testing products that are not one stop shop but can be effective in learning more about your users.

[Ethnio](#) is a product that allows you to conduct real-time recruiting from your website. By adding javascript to a web page, a pop-up will display a screener form on that page. If the web visitor meets the screener requirements then s/he will be invited to a remote usability testing session. Pricing starts at \$79 a month depending on page views and responses.

Survey software such as [SurveyMonkey](#), [Qualtrics](#) and [Google Forms](#) is another option for conducting unmoderated remote usability testing. You can embed links and images into a survey and ask participants to complete tasks. Although this approach has some limitations (i.e.cannot record, unable to listen to the participants' responses, and view screen actions) it is an effective approach for anyone with budget and resource constraints. Pricing: SurveyMonkey offers free and paid options | Qualtrics offers free and paid options | Google Forms is free.

[Optimal Workshop](#) offers several unmoderated remote usability testing products including [OptimalSort](#), which allows you to create a card sorting test so that you can get feedback from participants on the organization of your website and terminology. This product has free and paid options.

For a comprehensive list of remote usability testing software, please visit [Remote Usability and UX Research Tools](#), created by Nate Bolt, [Ethnio](#) founder and former Facebook Research Manager. He is also the author of the book, *Remote Research*.

## Remote Usability Testing Toolkit

A librarian and information professional should have the following tools for conducting remote usability testing:

- Computer
- A microphone or phone (if conducting a moderated remote usability testing)
- A software that allows you to setup a usability test and record participant's screen.
- A tool for managing the usability testing schedule (if moderated). **Examples:** [Doodle](#), [Calendly](#), or [Google Docs](#).
- A tool for tracking observations. **Examples:** [Google Docs](#) or [Evernote](#)
- A tool for storing documentation (e.g. consent form) and session recordings. **Examples:** [Box](#), [Google Docs](#), or [Dropbox](#)

## Steps to Setup and Launch a Remote Usability Test

1. Create the usability testing plan
  - a. Define your test objectives
  - b. Document tasks you want to test based on those objectives
2. Determine participant's compensation
3. Identify your participant requirements based on your objectives
4. Choose whether you will recruit your own participants or use a recruiting panel
5. Create a screener form that meet your participant requirements
6. If you are doing your own participant recruitment then
  - a. Create and send an announcement requesting usability testing participants. Send this announcement to the group you want to target (i.e. undergraduates).
  - b. Send an email to selected participants that includes next steps whether it is a link to schedule a session or take the test.
7. If you are conducting a moderated remote usability testing then
  - a. process is no different from in-person testing. You will have a moderator who facilitates the test and observers are able to watch the session.
  - b. The moderator and observer(s) take notes during the session.
8. Send a thank you note to participants along with any compensation.
9. View session recordings (if unmoderated) and take notes
10. Meet with your team to debrief
11. Present findings to your stakeholders and team

## Recruiting Participants

Jakob Nielsen, prominent user researcher, has found that conducting usability testing with 5-7 participants uncovers 80% of usability issues. Testing beyond that range will not provide much more insight. Steve Krug, another prominent user researcher, recommends testing with 3 participants and to set a cadence for testing regularly. As with Nielsen, Krug believes that testing with a small amount of users will identify the areas that are challenging to participants. You do not need to test 10 or 20 participants because 3 or 5-7 is enough to identify key issues. Overall, recruiting a small number of participants makes recruitment effort less daunting and a quicker turnaround time on results.

### **Remote Usability Testing Tips**

- Consult your legal department or Institutional Review Board regarding rules for testing users.
- Provide incentives (e.g. food/gift cards/raffle) for participants
- Keep unmoderated usability test duration to 30 minutes. Anything beyond 30 minutes may result in participants not completing all tasks.
- Be clear with your instructions and tasks.
- Pilot the test. Test driving your usability test should always be done. It will highlight any flaws in the usability test and allow for corrections prior to launching the test with a participant. With unmoderated remote usability testing, it is critical to pilot the test to prevent participant frustration.
- Anticipate no-shows. Select a few more participants to ensure that you have all the participants you want to test.

### **Conclusion**

Remote usability testing is a powerful tool for understanding how users use your website, services, or resources. What makes it powerful is the ability for you to test users anywhere and at anytime. It eliminates budget as an obstacle to understanding your users, as there are options to utilize free software or software you may already have access to conduct testing. You can test participants in their environment and gain insight in how they utilize or do not utilize your website, services, or resources. The various remote usability testing software provides flexibility on the approach you can take in learning more about users. Moderated remote usability testing allows the moderator and the participant to conduct testing online in different locations. This approach is typically used if a.) the objective is to gain deeper insight, b.) the test is complicated or c.) there are security or privacy concerns. Unmoderated remote usability testing allows the participant to take the test online anywhere and at anytime. This approach is typically used if a.) the objective may be to gather more quantitative data, b.) there is a time constraint and results are needed quickly, or c.) the tasks are straightforward. By conducting remote usability testing you will have another tool to make informed decisions on how to best support your users and to communicate your library's value.

## Endnotes

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