



RESEARCH AND EXPERIENCE

Usability testing session kit

Plan, moderate, observe and improve

Run moderated sessions around a meaningful task. Preserve what happened, identify specific product problems and define how the team will verify a change.

THE WORK

Agree the study question, prepare the task and observe participants working in a relevant context.

THE RESULT

A study plan, traceable task observations and findings with accountable action and retest criteria.

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01 / STUDY PLANNING

Define the study and decision

Purpose and outputs

A usability session gives a team direct evidence of how people understand and use a service. It can reveal missing information, misleading controls, inaccessible steps and recovery problems that remain hidden when a team reviews its own work.

This kit supports moderated sessions for a website, application or internal tool. It contains a study method, participant briefing, moderator prompts, task and observation records, and a findings process. Use it for a defined product decision: examining an important task, reviewing a proposed change, or checking whether a previously identified problem has been resolved.

Plan the session around the participant's goal and the evidence the team needs. Record what happens during the attempt, including assistance and technical limitations. The useful output is a finding that a delivery team can act on and a clear account of what the session established.

Task, participants and completion

Choose the task or part of the service to examine. Establish the question behind the study and identify the decision owner. The team may need to understand whether users can find essential information, complete a transaction, recover from an error or interpret a status correctly.

Document the intended participants, product version, device or channel, session setting and operating constraints. Identify which behaviours and access needs materially affect the task. Recruit people who actually encounter the relevant need; familiarity with the organisation's internal vocabulary can conceal problems that first-time users experience.

Define the important outcome for each task before the first session. An observable completion event gives the moderator and observers a shared basis for recording the result. Decide what evidence is needed for a partial outcome and what assistance must be recorded separately.

Use focused rounds that allow the team to examine findings and revise the design between rounds. Choose the participants and number of sessions according to the variety of important contexts and the decision being made. Small qualitative studies can expose problems; they do not establish a reliable population conversion rate.

02 / SETUP

Prepare the session

Environment and task materials

Check the environment, accounts, permissions and starting state. Confirm that the session cannot accidentally trigger charges, customer messages, changes to live records or other unintended operational actions. Use the organisation's approved environment and data-handling arrangements.

Prepare the task materials and test them end to end. The moderator should know which states are available, which integrations work and which parts of a prototype are incomplete. Record those limits so a product defect can be distinguished from a study setup problem.

Participants, roles and recovery

Arrange a quiet setting with suitable device and accessibility support. For remote sessions, test screen sharing, audio and any required assistive technology. Keep the participant's context relevant to the task; changing the device or removing their usual accessibility tools can change what the study reveals.

Assign one moderator and, where useful, a separate observer. Agree how observers will share questions without interrupting the participant. Explain who will attend, what information will be collected and how it will be used. Obtain the permissions required by the organisation's research process before any recording begins.

Keep a simple recovery plan for the study itself. If access fails or the environment becomes unusable, record the interruption and decide whether to restart, move to another task or reschedule. Preserve the participant's time and the integrity of the observation.

03 / PARTICIPANT OPENING

Brief the participant

Before the person begins

Explain the purpose and structure before asking the person to begin. Use the opening below as a reusable script, adapting factual details to the approved study arrangements.

Arrangements and context

Explain the presence of observers, the recording arrangements and the information the person should avoid entering. Confirm that they are comfortable with the agreed setup. If there is no recording, say how notes will be taken. Do not imply that participation requires agreeing to a form of data collection that the approved process treats as optional.

Ask a small number of context questions related to the task. Establish relevant experience, the person's usual way of completing it and any tools or support they normally use. Avoid introducing the interface terminology or showing the intended route during this discussion.

Reusable opening script

"Thank you for joining us. We are reviewing how this service supports the tasks people need to complete. I will give you a task and ask you to work through it as you normally would. Please say what you are looking for and what you expect to happen when that feels comfortable. I may ask follow-up questions about something you have done. You can pause, skip a question or stop the session at any time."

04 / TASK DESIGN

Write tasks around outcomes

Situation and completion

A task describes the situation and the outcome the person needs. It should provide the information they would reasonably have at the start while leaving them to decide how to proceed. A sequence of click instructions measures compliance with those instructions and can hide navigation problems.

For every task, prepare a starting state, the task wording, an observable completion condition and any necessary constraints. Make the material consistent across comparable sessions. If the moderator changes the wording or adds information, record that change.

Check whether the task itself reveals the answer. Interface labels, a feature's location or an instruction to use a particular control can lead the participant. Use the language they would normally encounter in the underlying need. Keep deliberate training or instruction studies separate from an attempt to observe unaided use.

Order, starting state and delivery

Consider how task order affects learning. Completing one task may reveal a route needed for another. Keep that effect consistent where comparison matters, or vary the order deliberately and retain the record. Reset the environment when a previous attempt changes the starting conditions.

Read the task once and confirm that the participant understands the situation. Clarify the scenario when necessary without explaining how to use the product. Allow time for the person to begin before asking follow-up questions.

05 / MODERATION

Moderate without taking over

Observe and follow up

Watch the sequence of actions and listen for the person's expectations. Allow short pauses; silence can be part of searching, reading or deciding. If the participant becomes quiet, a neutral prompt such as "What are you considering at the moment?" can help reveal their reasoning without suggesting the next control.

Delay explanatory questions that would disrupt an important attempt. Note the point and return to it after the task where possible. Avoid defending the design or explaining why a feature was built in a particular way.

When a participant asks for help, first establish what they are trying to accomplish and what they would normally do. If assistance is necessary to continue, provide the minimum required and record it. The subsequent outcome is assisted. A task completed after a moderator reveals the route should not be reported as independent completion.

End an attempt when the participant chooses to stop, the agreed stopping condition is met, the environment fails or continuing creates an unacceptable burden. Record the reason. Close the session by inviting comments on the overall experience and explaining what happens to the study materials under the agreed arrangements.

Neutral follow-up prompts

- What did you expect to happen there?
- What does that information mean to you?
- What are you looking for now?
- What would you do next if you were using this on your own?
- What information would help you make that decision?

06 / OBSERVATION

Capture the task outcome

Record what happened

Record the task, timestamp or sequence, visible action, relevant words and consequence. Use short notes during the session and complete them promptly afterwards. Keep quotations distinct from the observer's interpretation.

Track errors, repeated actions, unsuccessful searches, misunderstood information and recovery attempts. Describe the operational consequence where it can be established. Keep an untested explanation as a question for investigation rather than converting it into a finding about the participant's intentions.

Use timing only when the start and end events are defined consistently. Record interruptions and assistance. Thinking aloud, moderator questions and remote-session delays can affect duration, so report the study conditions alongside any times used in a decision.

Outcome classifications

Independent completion: the agreed outcome was reached without task-specific assistance from the moderator.

Assisted completion: the outcome was reached after task-specific help. Record what help was given and when.

Partial completion: the person achieved a defined part of the outcome. State what remained incomplete.

Not completed: the outcome was not reached. Record whether the person stopped, the product blocked progress or the study environment prevented completion.

Turn observations into findings

Group and substantiate

Review the observations by task and issue. Combine records only when they describe the same underlying problem. Preserve differences between user contexts, product versions and study setups that could explain different outcomes.

A finding should state the affected task, observed behaviour, consequence, supporting session identifiers and proposed action. Include enough detail for the team to reproduce the issue. Where the cause remains uncertain, define the investigation required before choosing a solution.

Consequence and interpretation

Assess priority through consequence and recoverability. A problem that prevents an essential task, creates an incorrect transaction, exposes information or leaves somebody unable to recover needs a different response from a minor delay. Consider how the issue affects users with relevant accessibility needs, even when it appears in only one observed session.

Use participant counts carefully. Report how many people encountered the condition among those who attempted the relevant task. Keep assisted attempts and interrupted sessions visible. Avoid treating a small convenience group as representative of all customers or converting a few observations into precise business-impact estimates.

08 / FOLLOW-THROUGH

Agree the change and verification

01

Assign

Name the owner and the accepted change.

02

Retest

Repeat the affected task and recovery path.

03

Decide

Record the result and remaining questions.

Owner, change and retest

Assign an owner to each accepted finding. Record the proposed change, any technical or operational dependency, and the condition that will establish whether the issue is resolved. Findings that need more investigation should have an owner and a next action too.

Retest the affected task after the change. Include the important starting conditions and any exception or recovery path involved. Where learning could affect the result, consider whether returning participants are suitable for the question being asked.

Preserve the research record

Keep the study materials, task wording, observations and decisions together under the organisation's access and retention arrangements. Close the research round with a short account of the decision made, the evidence supporting it and the questions that remain open. This gives the next team a usable basis for further work.

09 / WORKING RECORD

Study plan

Complete before recruitment and session preparation. Keep the study question and participant context specific to the product decision.

Study definition

Study question and decision owner

Product version, environment and study date

Participant criteria and relevant access needs

Session preparation

Tasks and observable completion conditions

Recruitment, permission and recording arrangements

Moderator, observer and operational constraints

Task and observation record

Use a separate record for each participant and task. Keep direct observations separate from interpretation.

Task definition

Participant identifier and task identifier

Starting state and task wording

Completion condition and stopping condition

Observed session

Observed actions, words and consequences

Assistance, interruptions and environment limitations

Outcome classification and evidence location

11 / WORKING RECORD

Finding and action record

Connect the product decision to the observations that support it. Record unresolved explanations as questions for investigation.

Finding and evidence

Finding title and affected task

Observed problem and consequence

Supporting session identifiers

Priority rationale and affected contexts

Action and verification

Agreed change or investigation

Owner, dependency and acceptance condition

Retest result and decision