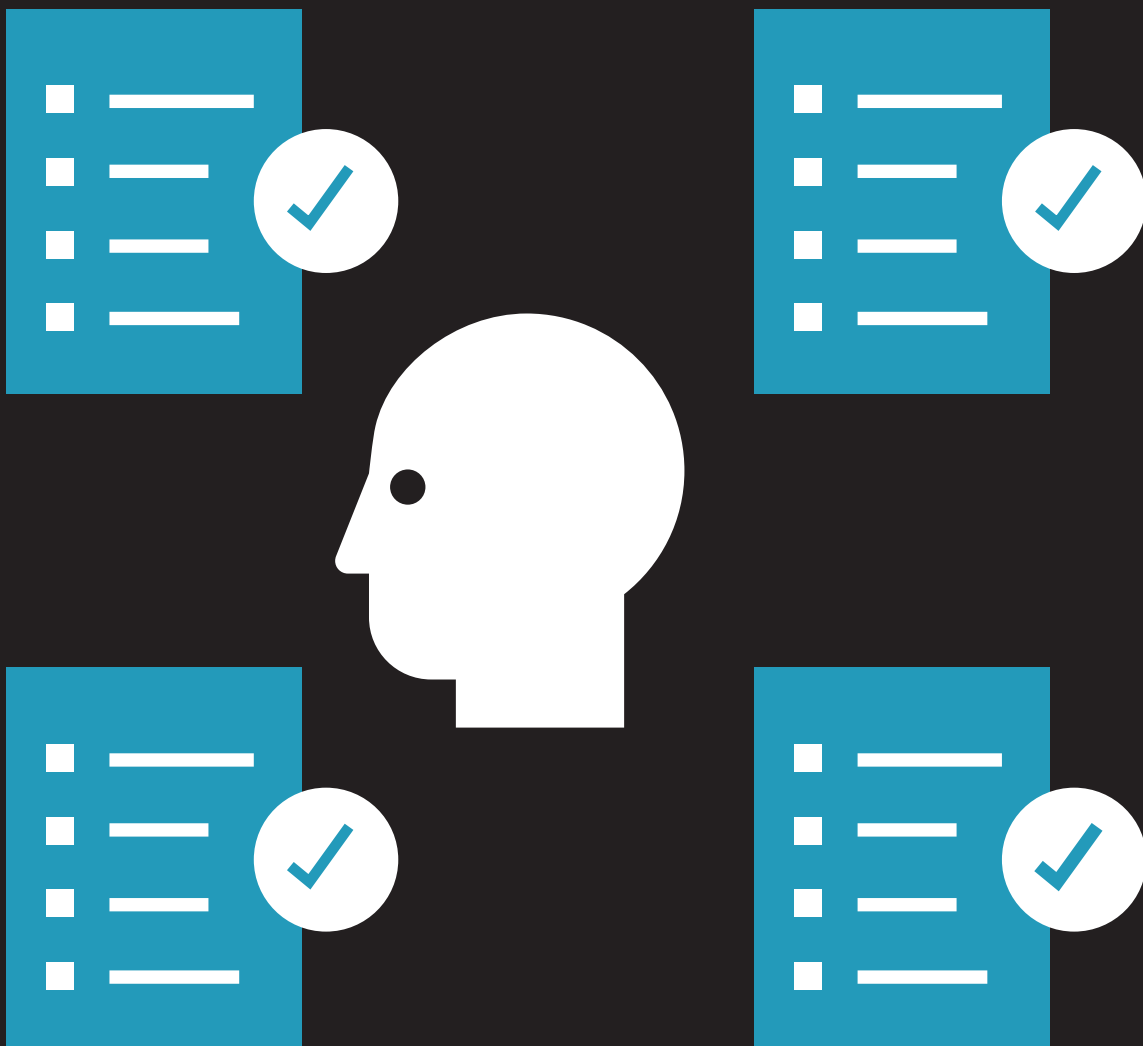


USER TESTING CHECKLIST

BY VANESSA TURKE, DIRECTOR OF USER EXPERIENCE



About this checklist

A step-by-step guide for gathering information about your site administrator's user experience, analyzing it and documenting actionable improvements!

User testing the administration of your Drupal site is a solid investment, as increased efficiency means less time fiddling with webby things and more time to dedicate to your organization's mission!

The purpose of user testing is to assess users ability to utilize site features efficiently and carry out mission critical site tasks without encountering significant barriers. Often sites are designed for the end user but leave the user experience of the administrator as an afterthought, or even forgotten altogether.

This checklist is designed to help you:

- **identify content workflow inefficiencies**
- **assess whether the information model is appropriate**
- **identify simple, small changes that could save admins hours of effort**
- **create a solid plan to improve the the administrative UX of your site**



1. PLANNING CHECKLIST

Planning Checklist

☐ Purpose of site

☐ User segmentation

☐ Purpose of study

☐ Goal of study

☐ Suspected Issues

☐ Contact List

Planning Checklist (Example)



Purpose of site - content source for educators interested in resources for teaching about ecological issues



User segmentation - org director, subject matter experts, content curators, writers, multimedia creator/editors, social media manager, community contributor (guest blogger)



Purpose of study - find ways to streamline the content creation/publication workflow



Goal of study - identify tools and process required to allow more users to create (but not publish) content directly on the site, make content curation process faster and easier, so that content can be published in a more timely manner and kept fresh with minimum of effort



Suspected Issue 1 - content creators are emailing in their submissions because of various content creation obstacles and site governance policies



Suspected Issue 2 - granular access restrictions not allowing people to help each other out with tasks in an efficient manner

Planning Checklist (Example Continued)



Suspected Issue 3 - content categorization is flat, contains redundancies and limiteds



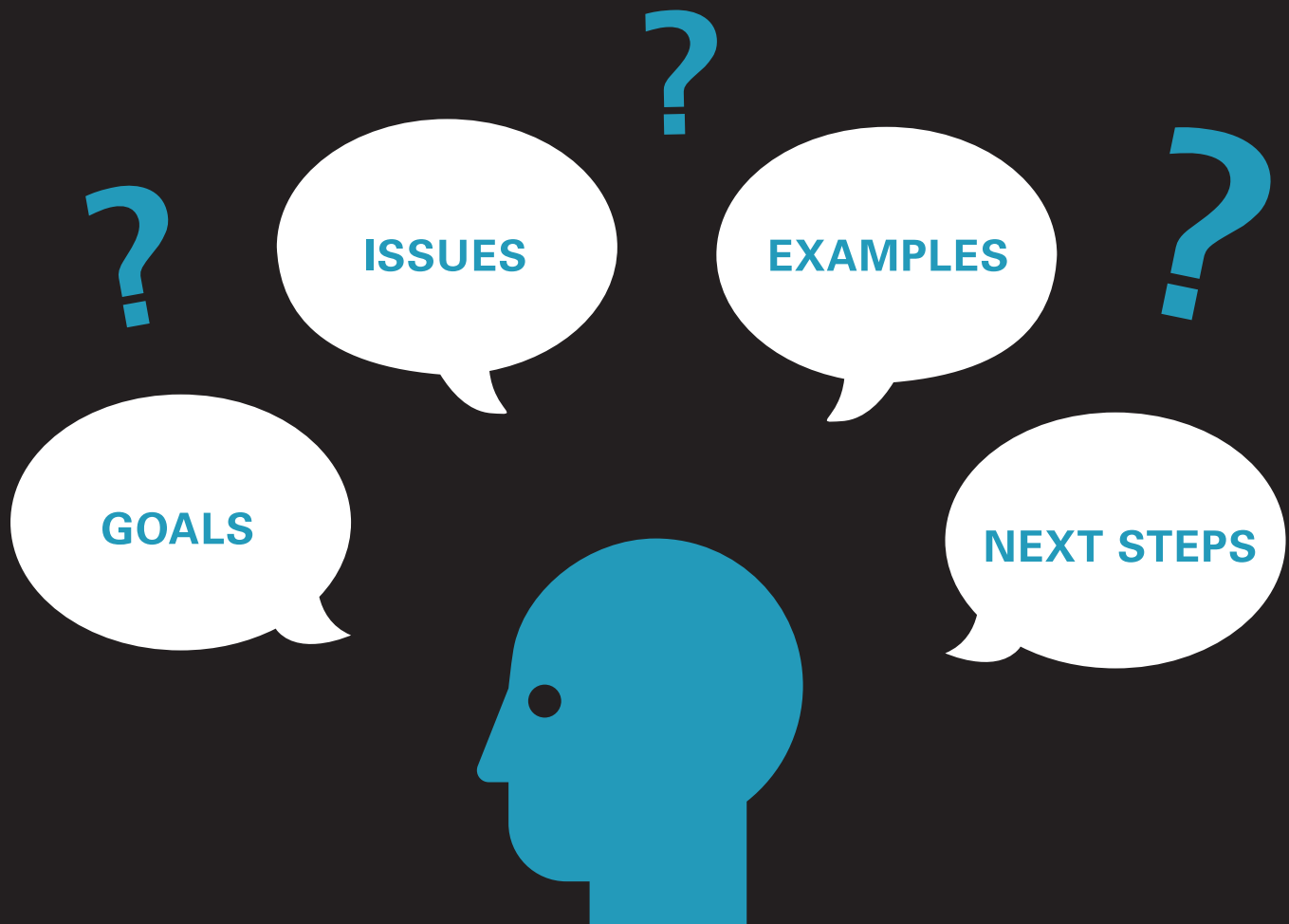
Contact List - People to interview to help identify testing scenarios and survey questions



2. STUDY CHECKLIST

Study Checklist

- ☐ **Updated Contact List-** complete list of people to interview, roles and responsibilities, contact info, test schedules and tools
- ☐ **Consent forms, NDA (if required)**
- ☐ **Planning Spreadsheet-** testing scenarios, survey questions
- ☐ **Tools-** Screen-capturing tool, survey tool, Skype, etc
- ☐ **Document-** Notes for observations, issues and inefficiencies
- ☐ **Analysis Tools-** Heuristic checklists, best practice guidelines, ux research and articles



3. REPORT CHECKLIST

Reports Checklist

☐ Goals Summary

☐ Issue Summary

☐ Recommendations Summary (content, tools, process, priority)

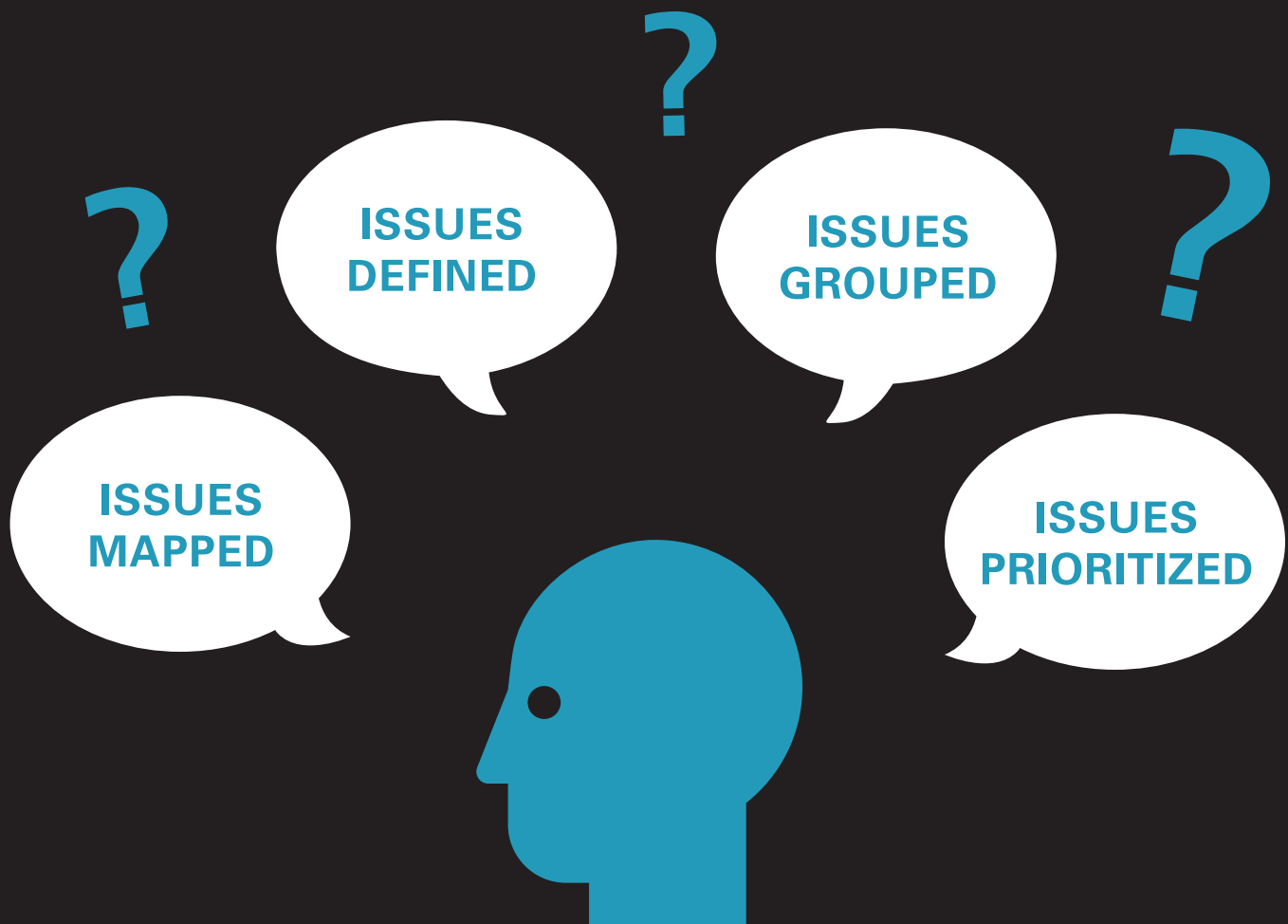
☐ Issues organized by type, user, site section, and or content creation process

☐ Annotated screenshots, video clips and quotes

☐ Recommendations by type, user, site section, and or content creation process

☐ Next steps and action items

☐ Note additional studies or re-test date



4. DEVELOPMENT PLANNING CHECKLIST

Development Planning Checklist

☐ Issues mapped to user stories (including value of need)

☐ Issues defined by 'what' not 'how'

☐ Issues grouped by type, user, site section, and or content creation process

☐ Issues prioritized by need

☐ Estimated items prioritized by level of effort with alternate suggestions