UserTesting

The complete guide

TO USER TESTING WEBSITES, APPS, AND PROTOTYPES

Understanding your customers is the key to any successful business, to ensure that you provide them with what they want and minimize what they find frustrating or challenging.

Whether it's a physical product or a digital experience, including websites or apps, you're more likely to meet—and exceed—customer expectations if you consider customer feedback throughout the product or campaign ideation, development, and optimization process. That way, in every step of the process, you're creating solutions and experiences that match what your customers are seeking.

UserTesting is an on-demand human insights platform that allows you to get qualitative data to understand intention and motivation driving customer behaviors. Understanding why customers make the decisions that they do helps you design and provide digital experiences that your customers will love.

With UserTesting, teams across your organization—from product to marketing to UX research and design—are able to:

- Uncover customers' needs and challenges as the starting point for designing solutions and campaigns
- Make faster, more informed decisions based on known customer needs
- Take a customer-first approach in everything they work on

In this guide, we'll cover how to plan, conduct, and analyze your customer studies. Well-planned and well-executed studies will uncover actionable, qualitative data that your teams can use to make faster, better decisions. And this results in delightful experiences that keep customers satisfied and coming back for more.

1. Define your objective

The first step toward gathering useful feedback is setting a clear and focused objective. If you don't know exactly what sort of information you're looking to obtain before you conduct your research, you risk launching a study that fails to yield actionable insights.

ASK YOURSELF: WHAT AM I TRYING TO LEARN?

Remember: you don't need to uncover every issue or problem in a single, exhaustive study. While it's tempting to try to cover as many challenges as possible, it's much easier and more productive to run a series of smaller tests with one specific objective for each. You're more likely to get focused feedback that guides you towards a solution or supports a specific decision or change.

As you set your objective, think about the outcomes, results, or KPIs that have greatest impact on your business outcomes. This sets the focus on gathering insights that align with strategies and activities that drive positive business outcomes.

For example, if you notice that customers who visit a certain page of your website don't typically convert, you can run a customer test on that page related to that KPI. Remember to ask open-ended questions to better understand customers' perceptions and how those opinions influence their choices and behaviors. You could also then ask them to try to make a purchase, to see if a usability issue impedes this activity. (Remember that if you ask a test participant to complete a purchase on your site, you should provide a promotional code.)

Example of a complex objective:

Can users easily find our products and make an informed purchase decision?

This objective contains three very different components

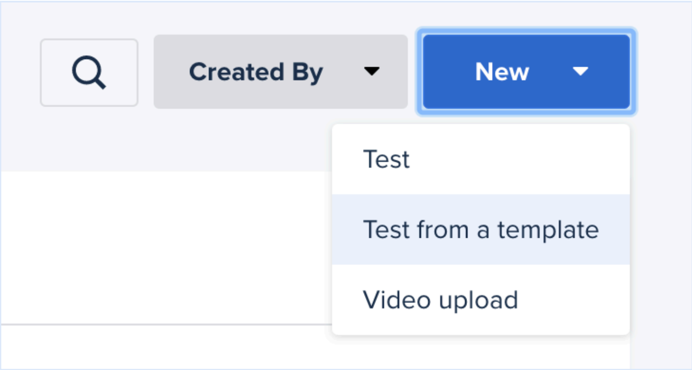
1. finding a product, 2. getting informed, and 3. making a purchase.

Example of a better objective:

Can users find the information they need?

2. Create your test

When creating a new test using the UserTesting platform, you can choose to create one from scratch, or you can use a premade template or create one based on the framework of a previous test.



NEW TEST FROM SCRATCH

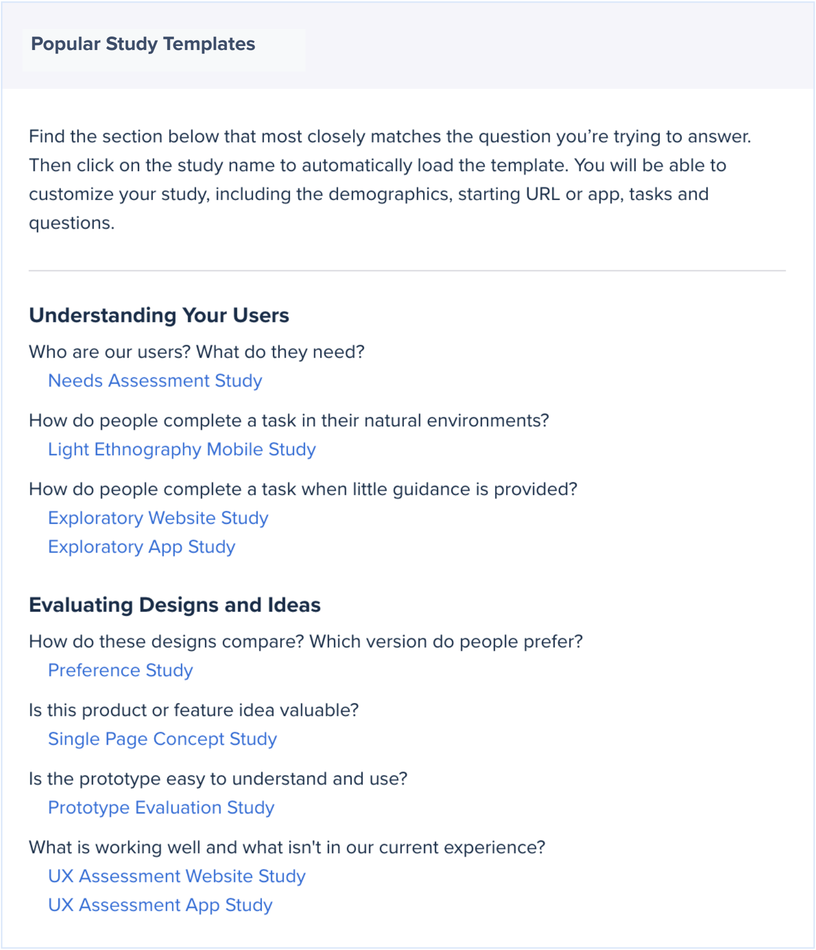
Selecting the **Test** button will create a brand new test from scratch.

NEW TEST USING TEMPLATES

If you're new to conducting customer studies and you'd like a bit more guidance on structuring your test plan, try our pre-made templates. The team at UserTesting created a series of templates based on popular and frequently used objectives across product and campaign development cycles.

You can access them with just a single click from your UserTesting dashboard.

You'll see a list of template options. Scroll down and select the website or app option that meets your needs, then review and customize before launching your test.



Popular Study Templates

Find the section below that most closely matches the question you're trying to answer. Then click on the study name to automatically load the template. You will be able to customize your study, including the demographics, starting URL or app, tasks and questions.

Understanding Your Users

Who are our users? What do they need?
Needs Assessment Study

How do people complete a task in their natural environments?
Light Ethnography Mobile Study

How do people complete a task when little guidance is provided?
Exploratory Website Study
Exploratory App Study

Evaluating Designs and Ideas

How do these designs compare? Which version do people prefer?
Preference Study

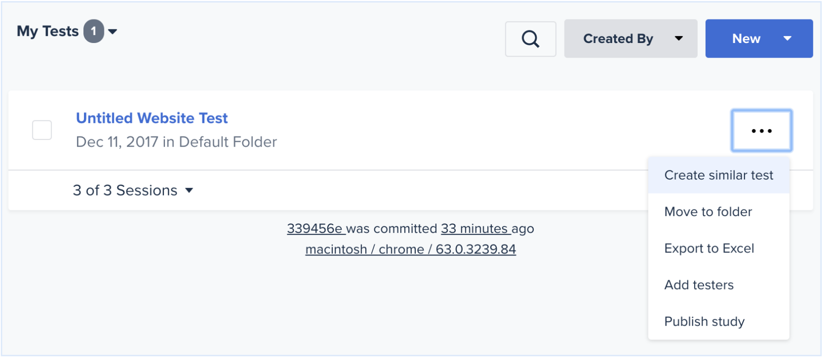
Is this product or feature idea valuable?
Single Page Concept Study

Is the prototype easy to understand and use?
Prototype Evaluation Study

What is working well and what isn't in our current experience?
UX Assessment Website Study
UX Assessment App Study

NEW TEST SIMILAR TO EXISTING TEST

You can also create a new test using the framework of an existing one. First, locate the test you wish to replicate. Click on the "**...**" and then select **Create similar test.**



You'll then see the tasks and questions from the original test, which you can edit until it's finalized and and ready to share.

You can also add additional participants to a previously launched recorded test by selecting **Add testers**. You may choose this option if a previously run test didn't yield conclusive findings and you want to get more feedback before making decisions on next steps.

3.

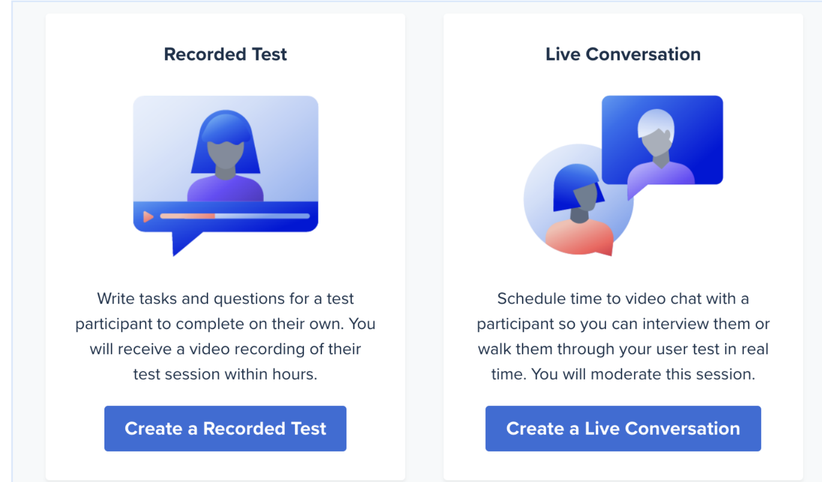
Identify the best way to get the answers you're seeking

Depending on your subscription, you may have the choice between conducting a recorded test or a live interview. No hard and fast rules exist about which option is the better choice for a given situation, but you should try to pair your expected outcome with the type of test that will support your efforts.

RECORDED TEST

A self-guided test, also known as a [recorded test](), is an unsupervised test completed by participants in their own time. You create the test with a series of prompts, including tasks and questions, which the participants follow as they complete the test. You'll receive a recording of the completed test, where you can see the participant's screen and what each participant is viewing as opinions and actions are narrated.

Recorded tests are great if you have a product, like a website or app, and you want the participants to go about an activity or action as they would in real life. For this reason, they tend to be about 10-20 minutes in length. Because participants are completing this test on their own, and in their native environment, it's as close as you can get to being "a fly on the wall"—observing how the consumer would naturally act and make decisions.



With UserTesting, you can choose between recorded tests or conducting live interviews using Live Conversation

LIVE CONVERSATION

Live Conversation allows you to schedule and conduct real-time interviews. By sharing your availability through the calendar, you can schedule live video interviews as early as that same day. Simply log in during your appointment time, and you can engage in dynamic conversation with the study participant, either from the UserTesting panel or your unique audiences (using My Recruit).

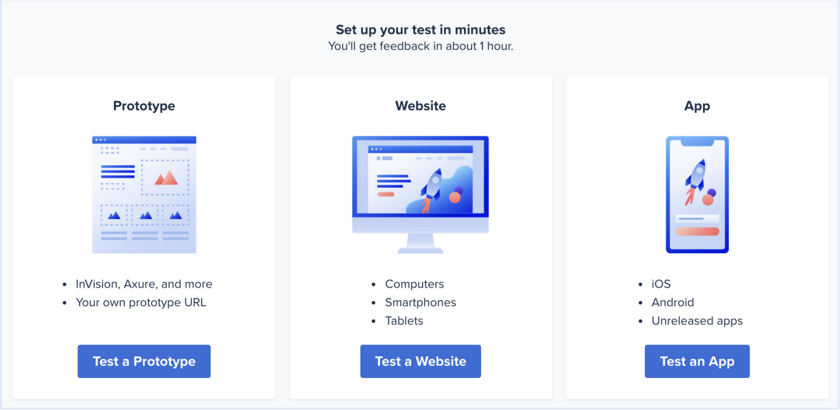
Interviews are great if you're looking to investigate a topic or have a free-form conversation, such as a discovery call or early in the product development cycle when you're still learning about customer pain points and problems. For this reason, Live Conversation studies tend to be 30-60 minutes in length.

4.

Identify what you're testing

Next, you need to share the product on which you're seeking feedback.

Product types include live properties, such as websites and apps, or unreleased products, like prototypes, or websites and apps still in development.



With UserTesting, you have the choice of testing a wide range of digital experiences

Conducting a test on live products entails providing a test participant with a URL or the name of the app in a digital marketplace (such as the App Store or Google Play). Similarly, many prototyping tools, such as InVision, or file hosting solutions, such as Google Drive or Dropbox, allow you to download a link for sharing the prototype. You can share the URL to get feedback on your prototype (make sure to open sharing permissions to ensure that all study participants are able to view your content).

The easiest way to test an app, released or unreleased, is to upload the .IPA or .APK file during test setup. We'll take care of all provisioning and certification, and we'll automatically upload the app to the participant's mobile device at the start of the test.

For more information testing mobile experiences, you can visit our Help Center or refer to this mobile testing document.

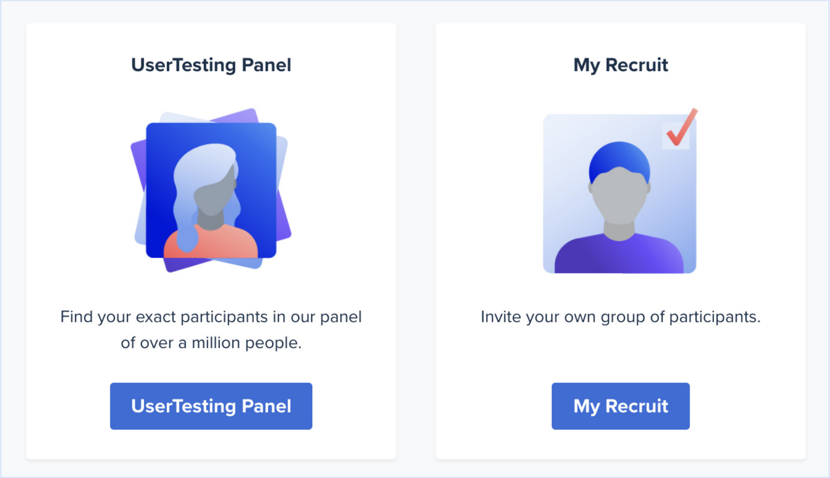
5.

Identify the types of people you want to include

In many cases, it's helpful to get feedback from a wide range of participants, spanning age, gender, and income level. This helps you understand how a wider audience perceives your products—whether products are easy to use and relevant to many, or whether they present challenges to some groups.

Or perhaps you have a very specific customer profile or persona in mind, and you want to make sure that you get feedback from people who meet a list of criteria.

Depending on your subscription, you have the choice to share your test with the UserTesting panel or with members of your network using My Recruit.



With UserTesting, you can get feedback from our proprietary, on-demand panel or your own audiences using My Recruit

USERTESTING PANEL

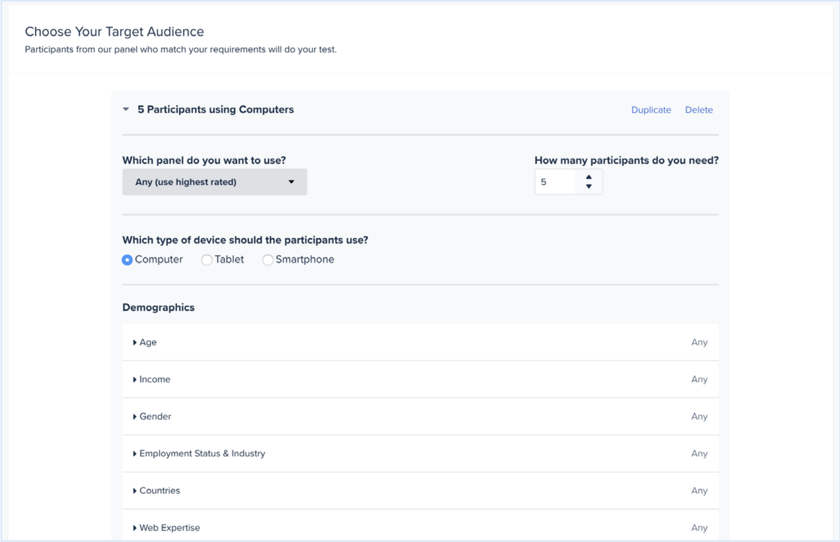
The UserTesting panel is our proprietary, on-demand panel, with participants located around the globe. People apply to be a part of the panel, and if they pass our screening criteria, they become panel participants. They receive notifications when a test matching their profile is available and can choose to accept it. When it comes to recorded test, most are completed and returned by panel participants within 1–2 hours, because of the size and responsiveness of our panel.

If you want to target a specific persona, you can adjust the demographics and write screener questions when setting up each participant group within your test. You can ask screener questions related to the participants' psychographics, such as hobbies, attitudes, behaviors, professions and titles, or anything that will help you locate precise participants.

You can select a single persona per test. Or, creating multiple participant groups within the same test allows you to get feedback on the same experience from different groups of people.

MY RECRUIT

My Recruit allows you to share your test with unique audiences that might be difficult to find in a panel, including people with specific demographics or backgrounds. All you need is a way of connecting with the audience members, like email addresses or a social media network, so you can share your study with them directly using our auto-generated link.



You can create different groups within a single study, to get feedback on the same experience from multiple audiences

How to decide which audience(s) to test

As a general rule, you can launch your test to the UserTesting panel to understand how audiences at large interact with and perceive your products, especially for B2C products. It's a great way to minimize the biases that might occur from only soliciting feedback from your current customer base or people who are geographically close to you. Using the panel is also a great way to get responses very quickly— often in under 1 hour.

My Recruit is a good solution when you want to get feedback from very specific people, including those who work in certain industries, hold specific job titles, or have esoteric knowledge, backgrounds, or experiences. You'll need a means of contacting these individuals, such as email addresses.

6.

Determine how many test participants to include

It's been demonstrated that five participants will uncover 85 percent of the usability problems on a website and that additional users will produce diminishing returns. Resist the temptation to "boil the ocean" by doubling or tripling the number of participants in an attempt to uncover 100 percent of your usability problems. It's easier and more efficient to run a test with five participants, make changes, run another test with a different set of five users, and continue iterating until all major challenges are resolved.

If you're looking for trends and insights beyond basic usability issues, it is helpful to include a larger sample size. We recommend five to eight participants per audience segment. For example, if you have three distinct buyer personas, you'll want to set up each persona within a test, for a total of 15–24 participants overall.

7.

Build your test plan (for recorded tests only)

If you're creating an recorded test, start by creating a test plan. Your test plan is the list of instructions that your participants will follow, the tasks they'll complete, and the questions they'll answer.

Task:

An action or activity that you want a participant to complete.

Example of a task:

Go through the checkout process as far as you can without actually making a purchase.

Question:

Something that elicits verbal feedback from the study participant.

Example of a question:

Was anything difficult or frustrating about this process?

CREATE A SERIES OF TASKS

Tasks are the actions that you want the test participant to complete. They complete one task before moving onto the next, so keep the ordering of tasks in mind as it will guide the test participant from start to finish. As they work through completing each task, they'll be sharing their thoughts out loud, which will be captured on video and saved to your dashboard when the session is finished.

When you're creating tasks for your test, focus on the insights you want to gather about the specific objective you determined. If you have a lot of areas you want to cover, we recommend breaking these up into different tests. In most cases, it's best to keep your test around 15 minutes in length, so keep this in mind as you plan your tasks.

Consider using both broad and specific tasks

Broad, open-ended tasks give your test participants minimal explanation about how to perform the activity. They're meant to help you learn how your users think, and are useful when you're seeking insight on branding, content, layouts, or any "intangibles" of the user experience. Broad tasks are good for observing natural user behavior—what people would do when given the choice and the freedom—which can yield valuable insights on usability, content, aesthetics, and users' sentimental responses.

Example of a broad task:

Find a hotel that you'd like to stay in for a vacation to Chicago next month. Share your thoughts out loud as you go.

One thing to keep in mind:

Responses may vary significantly from one test participant to the next. Be prepared to get diverse feedback when using broad tasks.

PRO TIP:

When you're not sure where to focus your test, try this tip. Run a very open-ended test using broad tasks like "Explore this website/app as you naturally would for 10 minutes, speaking your thoughts aloud." You're sure to uncover new areas to study in a more targeted follow-up test.

Specific tasks are defined activities that participants must follow. They provide the participant with clear guidance on what actions to take and what features to speak about. Participants focus on a specific action, webpage, or app, and speak precisely their perceptions of this experience.

One thing to keep in mind: specific tasks are most appropriate to situations in which you have identified a problem area or a defined place where you desire feedback.

Example of a specific task:

On this page, select an item that you would want to buy. Share how you went about making this decision and selecting the item.

Plan out tasks using a logical flow

The structure of your test is important. We recommend starting with broad tasks (such as, exploring the home page, then using search, then adding an item to a basket) and moving in a logical flow toward specific tasks (such as putting items in their online shopping cart in preparation for a purchase). The more natural the flow, the more realistic the test will be, putting your participant at ease and enabling better, more authentic feedback.

Example of poor logical flow:

Create an account > find an item > check out > search the site > evaluate the global navigation options

Example of good logical flow:

Evaluate the global navigation options > search the site > find an item > create an account > checkout

How you lay out your test plan should align with the objective originally set for your study. If you're interested in discovering the participants' natural journey or acquiring better understanding of their motives and rationale as they navigate your products, then give them the freedom to use the product in their own way. However, if you're more focused on understanding participant attitudes and behaviors in a well-defined context, then be specific in the tasks you assign and the questions you ask.

Additionally, starting with broad and then moving to specific tasks is important if you suspect that a specific task will require the participant to do something complicated or something with a high risk of failure. Putting these types of tasks near the end of the test prevents the participant from getting stuck or being thrown off track in the beginning, which could negatively impact the remainder of your test.

WRITE CLEAR QUESTIONS

Once you've mapped out a sequence of tasks in your test plan, start writing the questions. It's critical to structure questions accurately so you get reliable answers and gain the insights that will support your recommendations and business decisions.

TIPS FOR GATHERING RESPONSES

Use clear, everyday language

You want to provide a seamless experience for participants completing your study. Avoid industry jargon or internal phrases that participants might not know. Terms like “sub-navigation” and “affordances” probably won’t resonate with the average user, so don’t include them in your questions unless you’re certain your actual target customers use those words.

Include the time frame

If you’re asking about some sort of frequency, such as how often a user visits a particular site, make sure you define the timeline clearly at the start of the question. This ensures consistency and accuracy in the responses that you receive.

Example of time frame in question:

In the past six months, how often did you visit Amazon.com?

Frame questions for more standardized responses

Gathering opinion and preference data can be tricky. To ensure that you collect actionable insights that support changes and decisions (instead of a range of diverging opinions), it is critical that you standardize the experience so that participants answer the same question and provide helpful feedback.

Ensure rating scales are balanced

Be fair, realistic, and consistent with the two ends of a rating spectrum. If you’re asking participants to select the more accurate response from two options, ensure that they’re weighing each end of the spectrum evenly.

Example of an unbalanced scale:

After going through the checkout process, to what extent do you trust or distrust this company?

I distrust it slightly ←→ I trust it with my life

Example of a balanced scale:

After going through the checkout process, to what extent do you trust or distrust this company?

I strongly distrust this company ←→ I strongly trust this company

Separate questions to dig into vague or conceptual ideas

Some concepts are complex and can mean different things to different people. For example, satisfaction is a complex concept, and people may evaluate different things when concluding whether or not they're satisfied with a product or experience.

To ensure that your test yields actionable feedback, break up complex concepts into separate questions. Then, consider all of the responses in aggregate when analyzing the results. You can even create a composite "satisfaction" rating based on the results from the smaller pieces.

Example of question on a complex concept:

On a scale of 1 to 5, with 1 being "Very satisfied" and 5 being "Very unsatisfied," how would you rate your satisfaction with this children's online learning portal?

Example of breaking up questions on a complex concept:

On a scale of 1 to 5, with 1 being "Very easy to use" and 5 being "Very difficult to use," how would you rate the ease of use of this children's online learning portal?

On a scale of 1 to 5, with 1 being "Very appealing" and 5 being "Very unappealing," how would you rate the visual design of this children's online learning portal?

Remember: one of the great benefits of qualitative research is getting to the "why" of human behavior. For every question, if you find yourself asking "why" a person might respond a certain way, you have the opportunity to include additional questions to better understand the source of an opinion.

Avoid leading questions

Sometimes, when asking questions, you can inadvertently influence the participant's response by including small hints in the phrasing of the questions themselves. In doing so, you influence the outcome of your studies because you get biased, inaccurate responses and results.

Be sure that your questions are neutral, unbiased, and free of assumptions.

Example of a leading question:

"How much better is the new version than the original home page?"

"Compare the new version of the home page to the original. Which do you prefer?"

8.

Launch a dry run test

Before you launch your test to all participants, we recommend conducting a dry run (sometimes called a pilot test or stress-testing) with just one or two participants. This will determine whether there are any flaws or confusing instructions within your original test plan and provide the opportunity to make adjustments and improve the test plan before launching it fully.

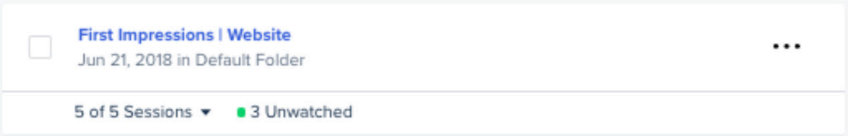
Here's a good structure for doing this:

1. When creating a test, select one or two participants. Then launch that test.
2. Review your videos and listen as they process each task and question. Take note of any trouble they encounter while trying to complete the tasks and questions or if any responses fail to provide the type, level, or quality of insight you expected.
3. After reviewing your videos of those one or two sessions to ensure that you are getting the types of feedback you are expecting, you can click on Add testers to include additional test participants in that test.

9.

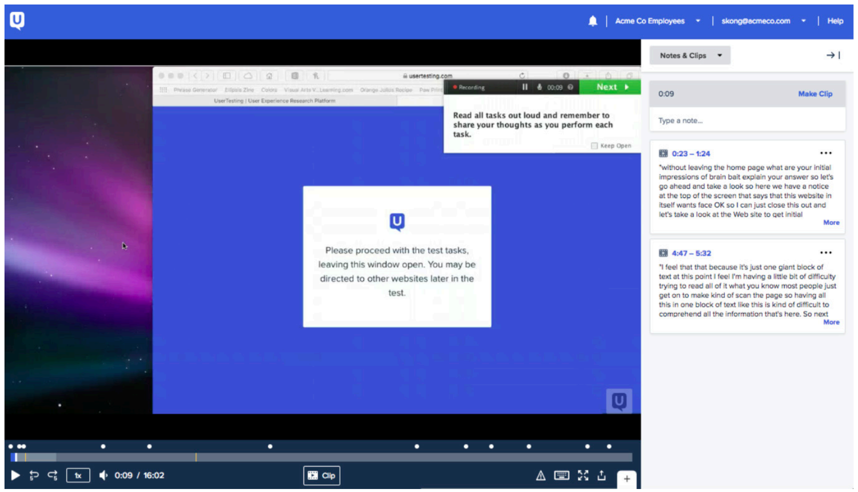
Analyze your results

You'll receive email notifications when your recorded tests have been completed (or when your Live Conversation sessions have been scheduled). Once you've received your results, you'll have the opportunity to analyze the responses and begin extracting insights to support your recommendations and decisions. You'll know that you have sessions awaiting your review based on the status under the test name.



On your dashboard, you'll be able to see if you have sessions awaiting your review

As you review your results, you can take notes using the Notes & Clips feature in the video player. The timestamp that's captured alongside each note will correspond with the related portion of the recording, making it easy to jump back to that section of the recording later.



As you review answers to your questions, keep an eye out for similar responses and themes as well as any major deviations. If a significant number of your participants provide similar feedback, this could signal an issue that impacts your larger customer base and deserves some attention. Or, if one or a small number of participants shares a unique piece of feedback, you can hone in on this particular video to better understand why that participant or participants had such a different experience.

Take note of user frustrations as well as things that users find particularly helpful or exciting. By knowing what people love about your product experience, you avoid the possibility of "fixing" something that's not really broken. Hearing about things that customers struggle with, as well as enjoy, can support informed discussions on future product and experiential improvements.

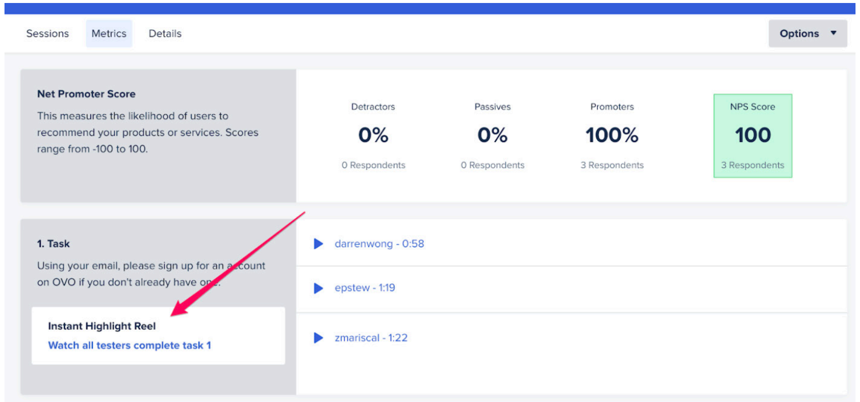
10.

Share your findings

After you've uncovered your findings, you can share them with your team and stakeholders to begin discussing next steps.

Here are a few ways to share findings with your team:

- Create a highlight reel that aggregates critical video clips. This is especially helpful when you have multiple participants with the same opinion—the curation of this feedback can be compelling. You can even create an Instant Highlight Reel from within a single task, to watch in rapid success as each of your participants completes the task.



You have the option of creating a highlight reel based on a single task

- From your dashboard, you can choose to export your study into an Excel file to see responses side by side for easier searching and comparison. Learn more here.
- Create charts to represent interesting data and findings from your questions. This can be used to visually convey the volume of participants who say similar things (such as a word cloud) or to display the difference in opinions.
- Share participant quotations from the studies to back up your hypotheses or recommendations. Hearing straight from the Voice of the Customer is a powerful step in aligning team members and other stakeholders.
- Share directly to your public Slack channels to speed insights to your team. Learn more here.
- You can also share insights on Trello. With the UserTesting Power-Up, you can view completed videos right on your Trello board. Learn more here.

PRO TIP:

It's important for everyone to remain objective and neutral—both when presenting and hearing feedback. Be careful not to place blame on teammates. If you have a lot of negative findings, choose your words carefully. "Users found this feature frustrating" is much easier to hear than "This feature is terrible."

And while receiving feedback can be tough, it's important to reiterate that the feedback presents an opportunity to improve products and experiences for customers. Encourage team members to ask questions about the findings, and remind them not to make excuses.They're there to learn about the customer experience, not to defend their design decisions.

11.

Champion a customer-focused attitude throughout your organization

We encourage you to gather customer insights throughout your product and campaign development process and across multiple teams and departments.

- Early in your process, it will help you better understand customer pain points and challenges, in order to more effectively brainstorm and support product and solution ideation. You can also hone in on the right customers and audiences to assess market opportunities and analyze product-market fit.
- You can understand usability challenges in your prototypes or early stage products to course-correct before you've spent much time or resources on development.
- As you launch new digital experiences, you can monitor how customers are reacting to and interacting with these new products. This yields ideas on how to continue evolving your product.

Getting frequent feedback and insights from your customers is the best way to keep your finger on the pulse of customer challenges and expectations. This will ensure that you're making the right decisions and taking the right steps towards ensuring ongoing customer loyalty and satisfaction.

About UserTesting

UserTesting enables every organization to deliver the best customer experience powered by human insights. With UserTesting's on-demand human insights platform, companies across industries make accurate customer-first decisions at every level, at the speed business demands. With UserTesting, product teams, marketers, digital and customer experience executives confidently and quickly create the right experiences for all target audiences, increasing brand loyalty and revenue. UserTesting delivers human insights to over 35,000 customers, including the top 10 largest web properties, and is backed by Accel and OpenView. UserTesting is headquartered in San Francisco CA. To learn more, visit www.usertesting.com.

UserTesting

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