
Steph McDougal, McDoux Preservation
Session Agenda

• Introduction
• What are Usability and User-Centered Design (and why should I care)?
• Interactive, Step-by-Step Walkthrough of the Usability Evaluation Process
• Wrap-up and Q&A
Usability and User-Centered Design

- Not just *functionality*
- Based on 20 years of research by Dr. Jakob Nielsen and Dr. Donald Norman
- Find more information, plus forms and templates online at [Usability.Gov](http://Usability.Gov)
Applying Usability to CRM

Websites!

Documents!

Interactive Exhibits!
Usability, Step by Step

- Decide how to measure success
- Identify users and their goals vs. your goals
- Develop the evaluation process and materials
- Recruit participants
- Conduct the evaluations
- Analyze the data
- Make changes, then verify that they worked
Measuring Success

• Intuitive Design – easy to figure out
• Effectiveness – enables us to do what we need to do
• Efficiency – doesn’t take much time
• Satisfaction
Your Users .... and What They Want

• Identify them by:
  • Demographics
  • Role/Experience

• Determine their goals, not just your goals
Identify User Goals: *Ask The Users!*

Qualitative methods produce anecdotal data; identify possible goals

- Contextual interviews with individuals
- Focus groups

Use surveys to quantify the extent to which each potential goal is true for a larger population
Develop the Evaluation

- Only test what you want to measure!
- Materials for the user (whatever they need for the task)
- Materials for the evaluator (you create this!)

<table>
<thead>
<tr>
<th>Task Checklist</th>
<th>Time</th>
<th>User Questions/My Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>☒ Locate “lot coverage” measurable standards.</td>
<td>0:47</td>
<td>Skipped TOC. Flipped past LC twice.</td>
</tr>
<tr>
<td>☒ Calculate max. lot coverage for lot correctly.</td>
<td>2:33</td>
<td>“Does the front porch count?”</td>
</tr>
<tr>
<td>☐ Calculate lot coverage for example correctly.</td>
<td>4:17</td>
<td>Included/excluded list is not clear!</td>
</tr>
<tr>
<td>☐ Determine whether example meets standard.</td>
<td>1:11</td>
<td></td>
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Recruit Participants

• You only need five (per user type)
• Schedule plenty of time for each one
• Choose a realistic location
Conduct the Evaluations

- Participant rights and instructions
- Permission to record video
- "Think aloud" (play-by-play narration)
- Help, if needed
- Survey at the end
- Debrief/conversation
Analyze the Data

• Complete notes
• Compare evaluations
• Look for patterns
  • What worked?
  • What didn’t?
• Quantify data
• Look for relationships between variables
• Ask other people to help
That's All There Is To It!

- Test again after you make improvements
- Usability is easy and inexpensive
- Learn more at Usability.gov

You can do this!