

## UPA 2003 Idea Market Participant “Bill of Rights”

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A critical component of participant recruiting includes how we treat participants throughout their entire usability-study experience, not just during screening and scheduling. When participants have a good overall experience, they are more likely to want to come back for future studies if needed, or to recommend others they know as participants. This discussion provided attendees with ideas for improving the “care and feeding” of their usability test participants.

### **The posted questions were:**

What are some ways in which we can treat participants more as human beings and less as test subjects?

How can we put participants at ease during the study session?

What about session breaks and refreshments? What’s the minimum we should provide? The optimum?

What special considerations do we need to provide for participants with disabilities, children, or senior citizens?

How can we gracefully excuse participants who beat the screener or otherwise turn out to be unacceptable?

What kind of pre- and post-session activities should we pursue with participants, without jeopardizing data?

What are some ways in which we can tend to participants’ physical comfort and personal safety?

How do we and why should we guarantee participants’ privacy?

Our attendees who mainly were usability specialists, not participant recruiters, provided the following tips and suggestions for humanizing the participant usability-testing experience.

### **Interaction with Participants**

Begin the session by thanking participants for their willingness to participate in the usability evaluation. They will feel valued from the start.

Use “ice-breaker” techniques to put participants at ease. “Schmooze” with participants. Ask them about themselves, chat about non-test-related things, etc.

Be sure to reiterate (several times, if necessary) to the participant: “We’re not testing you; it is you who are the person testing the system...” This helps put the participant at ease with the testing experience.

Let the participant know that they can stop the session at any time.

### **Lab Comfort**

- Make sure all furniture is comfortable and ergonomic.
- Make the lab less lab-like with pictures, posters, plants, etc.
- Ensure that the lab is safe and comfortable.

### **Test Tasks**

- Let participants know up front when you have more than enough tasks for the session time allotted and that they may not finish all tasks. This will mitigate feelings of failure if the participant runs out of time and you still have unfinished tasks.
- Always start with an easy task to give participants an immediate positive experience.
- Provide written task scenarios for handy reference. Participants won't need to remember the task and you won't need to keep repeating it.

### **Asking for Feedback**

- When asking for additional participant feedback, always phrase your request positively. E.g. "You've provided us with some great information. Now I'd like to ask for some feedback on..." Participants are more likely to be open to providing more feedback.
- Let participants know how their participation will help the development or redesign of the system you are testing. They will feel more a part of the improvement process.
- Remind participants that they are testing *their* system to help improve their own experience.

### **Boredom and Fatigue**

- Vary activities for group sessions to mitigate boredom.
- Schedule breaks in the session to mitigate fatigue. Call for an ad hoc break if you see a participant getting frustrated with a difficult interaction.

### **Observers**

- Be sure all observers are respectful and quiet.
- Let participants know when there will be observers and who they are—they have a right to know
- Never let a participant's manager observe his/her session.

### **Working with Kids**

- When working with kids, try to have them work in groups of twos or threes to increase their comfort level.
- Recruit kids through their parents or schools, not directly.
- Assure parents and schools that the research is legitimate; provide documentation to explain.

### **Working with Seniors**

- Schedule shorter sessions.
- Provide all text material (print and online) in large font.
- Hold sessions earlier in the day.

### **Food and Incentives**

- Consider food as a necessity, not an incentive. At the very least offer water, soda, milk, and/or coffee/tea.
- Provide food that's appropriate for the time of day. For example, doughnuts/muffins in the morning, pizza and salad for lunch, a more complete meal for dinner, and a variety of snacks and beverages throughout the day.

### **Maps and Directions**

- Make it easy for participants to get to your test session. Bad maps or poor directions can cause unnecessary anxiety and frustration before the session even begins.

### **Privacy**

- Assure participants their identity will remain confidential.
- Let participants know that video-tapes are for research only and won't be seen by the general public.
- Make sure participants sign a video-release form that explains how the video will be used.
- Don't videotape if the participant balks; just take very good notes.