

Conducting a (user-centered) expert review

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The
challenge:
“tell me
now”

- “Please look at this ...”
(page, application, form, etc)
- Answer required immediately
- We know the ‘right’ answer is testing
- But...
 - There isn’t any time
 - There isn’t any budget
 - We’re supposed to be experts anyway
- So, what to do?

5 steps for a user- centered expert review

The 30-minute version

- How do you review a product for usability, but make that review user-centered?

Step 1: Don't look at it

- You only have one chance to see it for the first time...and to think about it like a user
- If you look at it before you try to use it, you'll see it differently

Time so far: 1 minute for discussing this point

Step 2: Write a story

- Also known as a 'persona'
(but we don't have time for full persona development)
- The story
 - Who is using this product?
 - Why are they doing it? How do they feel about it?
 - What do they expect to happen?
- Are they different from us, right now?
 - If so, how different?
 - Are we confident we really know these people?

Time so far: 5 minutes

Try it

- We've been asked to look at a web page for a state motor vehicles office.
- Working with your neighbour:
 - Who is using this site?
 - Why are they doing it?
 - How do they feel about it?
 - What do they expect to happen?
- Are they different from us, right now?



Step 3: Try to use it

- Why are they using the site?
 - If they are looking for information, try to find it (or find the first step you would take)
 - If they are trying to do something, try to do it (or find the place to do it)
 - What else do they want to know? Can they find the information they need?

Time so far: 15 minutes

The screenshot shows the homepage of the State of New Jersey Motor Vehicle Commission. At the top, there is a search bar and navigation links for "NJ home", "Services A to Z", "Departments/Agencies", and "FAQs". Below the header is a navigation menu with categories: Popular Topics, Locations, Vehicles, Licenses, Violations, Inspections, Commercial, Business Licensing, and About MVC. The main content area features a large banner with the text "Excellence in Motor Vehicle Services" over a background of cherry blossoms. To the left of the banner is a "Popular Topics" sidebar with links such as "Renew driver license", "Find locations", "6-Pt ID Verification", "Renew registration", "Contact us", "Change your address", "Download a form", "Relocate to New Jersey", and "School bus safety". Below the banner are two columns of content. The left column is titled "6 Pt ID Verification" and includes a sub-section "En Español" with a link to "Selector de Documento de Verificación de 6 puntos". Below this are two search boxes: "Find Locations and Hours" and "Find State Inspection Facilities", both with a dropdown menu set to "Atlantic" and a "Go" button. The right column is titled "Online Services" and lists various links like "Login to MyMVC", "Renew vehicle registration", "Change your address", "Order personalized plates", "Pay restoration fees", "Pay surcharge fees", "Request a driver history abstract", "Schedule a road test", "Schedule an inspection", "Pay parking and traffic tickets", and "More>>". To the right of the "Online Services" column is a "Highlights" section with links for "Closing and delays", "Press Releases", "Get a copcode", "Search for school bus inspection results", "Medical Review", "New Limo Driver Requirements", "A Parent's Guide to Teaching Teens", "Rulemaking Proposals", and "Take a sample driver's test".

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Step 4: Now look at it

- Look for relationship problems:
 - What are the users goals?
 - What are the business goals?
 - Are these in alignment?
- Look for conversation problems:
 - Are the headings, text and images meaningful?
 - Can the user find good “first clicks”?
- Look for appearance problems
 - Does it look tidy and attractive?

Time so far: 25 minutes

STATE OF NEW JERSEY
MOTOR VEHICLE COMMISSION

Search →

NJ home | Services A to Z | Departments/Agencies | FAQs

Popular Topics: Locations, Vehicles, Licenses, Violations, Inspections, Commercial, Business Licensing, About MVC

Renew driver license
Find locations
6-Pt ID Verification
Renew registration
Contact us
Change your address
Download a form
Relocate to New Jersey
School bus safety

Excellence in Motor Vehicle Services

6 Pt ID Verification
Get the Facts

En Español Selector de Documento de Verificación de 6 puntos

Find Locations and Hours
Atlantic [v] Go

Find State Inspection Facilities
Atlantic [v] Go

Online Services:
[Login to MyMVC](#)
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Highlights:
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Step 5: Reporting

- We've got 5 minutes left from our budget
- Not enough time to report everything
- Suggestion: pick examples of different types of problems
 - relationship
 - conversation
 - appearance
- Include at least one positive comment
- Your aim: get more time

A bit more about being user-centered

- What we've just described is really a "persona-led heuristic inspection"
- The user story – the persona and goal – guides the review.
- Your knowledge of usability and good design help you understand the problems "the persona" encounters.
- Heuristics (guidelines or a checklist) can help you keep critical points in mind.

Using personas to guide the review keeps us grounded in the user experience

- You may have
 - A well-developed set of personas (or information about users in another format)
 - Almost no information besides common sense and your own assumptions
- But you can still create a user story and base the review on that story.

Case study: At the Open University, we use personas to review new designs



GEORGE

“Professional updater”
Enquirer

SCENARIO

George has set himself a target of getting a plan together within a few weeks. He is looking for how to get a degree; keywords are ‘management, health, occupational therapy’. He is at home in his study with a beer.

WHY DO THEY VISIT THE OU

George saw an advert for the OU on ‘Public Servant’ online.



Open University

We ask how each persona will start their journey on the site

SITE WALK-THROUGH WITH PERSONAS – 23 JUNE 2004

Persona	First Click	Use of Search	Path in Site	Summary
Ruth “The learner” Student (~60% of traffic)	Student Home (login) Or Studying at the OU	Not likely to search	<ul style="list-style-type: none"> From OU Home Ruth chooses ‘Studying at the OU’. From there she either browses the subjects – Maths, Economics, Social Sciences and is once more enthused about study. Or she clicks ‘Talk to a person’ and finds out about events in her area. Alternative <ul style="list-style-type: none"> Ruth may start from Student Home where she tries Next course but is put off by the mechanical nature of the page. She goes into her qualification page and from there clicks through to more information about the BA/BSc degree. 	Generally successful Although a current student Ruth is in many ways like an enquirer. Success depends on her finding links that help her maintain a connection to the OU and be engaged for each course. We need to ensure that the site does not take current students for granted, and offers appropriate support even on the student home.
George “Professional updater” Enquirer (~30% of traffic)	Studying at the OU	Uses search only when browsing fails	<ul style="list-style-type: none"> From OU home page, chooses “Studying at the OU He then clicks into Health and Social care and is a bit confused by the apparent richness of the offer. He tries Management and eventually comes across the BA/BSc degree which talks about Relevance of subject matter which appeals to him. He also notices and navigates to the Credit Transfer information – he may be able to count his DipE towards the degree. 	Successful. There are enough keywords on the page to attract George and interest him to read more. Lateral links that offer a variety of options are important for success in answering any of a variety of questions.

Case study: A review of a county council web site.

Our personas

- Jenny, a young mother
- Amir, a shopkeeper
- Dennis, recently retired
- Gina, just moving into the area
- Darren, a teenager
- Edna, an elderly resident

The screenshot shows the South Oxfordshire District Council website. At the top, there is a search bar and navigation links for home, online services, browse info, contact us, sitemap, accessibility, legal notices, and website statistics. Below this is a 'News' section with a featured article titled 'Election Results' and several other news items. A 'Main Section Menu' is visible, listing various services such as Advice, benefits and emergencies, Business, Health and Social Care, Leisure and countryside, Life Events, News, and Transport and streets. On the right side, there are 'Quick Links' and 'Site Features' sections, including 'View our webcasts', 'Local Elections', 'OUTBURST Video newsletter', 'Listen to this website', 'Register for email alerts', and 'Find services countywide'.

Case study: A comparative review of technology shopping sites

Experienced Geek

This is the current typical user. He is young, techie and knowledgeable. Whether he's building the perfect system, checking out the new toys or doing a favor for a friend, he's always in the market for new gear.

When he hits the site, he knows what he's looking for

- The best price on a specific item
- The best product to meet a specific need

He's not concerned with subtleties or pretty graphics – just get him the information he needs ... and then get him the products as fast as possible.

He needs a user interface with:

- Fast paths to products, with all the information in one place
- All of the technical details...all of them
- An easy way to store research, so the final purchase is easier.

Online Shopper

This user is an experienced online shopper. Amazon sends her Christmas cards, and she knows how to find the best airline fares. She's way over being nervous about her credit card or e-commerce security.

The one thing that does scare her is buying e-gear. Why can't the computer and electronics industry make fewer products and give them easier to remember names? She used to think she knew this stuff, but she still remembers when she bought the wrong graphics card --- and couldn't return it.

She likes being offered advice – as long as it is reasonable, and actually helps.

She needs a user interface with:

- Easy-to-read information about each product (on any page with product info)
- Information about requirements, warranties and other policies in clear, plain language
- Good pictures to help her recognize products she has seen in an article or store

Tentative Shopper

This user is a more general consumer. He is likely to be looking for consumer electronics or computer accessories, not parts to build his own machine. He's a little embarrassed about how little he knows about electronics, but this only makes him a little angrier when sites don't give him the information he needs.

What he really wants is to ask his friends, but you can't do that forever – and even then, he has to get online and find what they recommend.

He needs an interface with:

- Guidance that doesn't make him feel foolish
- A way to ask questions, or find products without part numbers or too precise language
- Support in finding compatible products (or avoiding incompatibilities)

If you have assumptions, state them clearly

- This makes it possible to understand the context in which you make a recommendation
- You can acknowledge constraints (business or design requirements) you had to take into account
- You can adjust your opinion more easily if you learn something new

A good review considers more than just a checklist

- Checklists are useful to help you remember points to think about
- The activity of looking at the site from the perspective of a user story helps you focus on the user experience.
- Put them together...and you have a user-centered expert review

What if you've got more time?

The two-day version

- Add more depth and breadth to your view

Get a second opinion

- More people means
 - More insights
 - Less chance of getting fixated on a minor issue
- For best results: real users
 - But you can also work with another expert, business (SME) experts or other surrogates

Look at the competition

- What other sites or products do your users see?
- Who else asks similar questions?
- Are there any conventions that you should be exploiting?
- How are those sites organized?

More comprehensive reporting

- Wider coverage of tasks and people
 - Include more users, especially those that contrast
 - Include more user goals
- Wider coverage of problems
 - Aim to discuss details of every question
 - If the client likes a particular severity scale then use it
- Make the report easier to use
 - Include more screenshots / call-outs
 - Edit to focus on most important messages

Let's try it with more than one story



Jason has taken a year off after high school before continuing his education. He wants to know how to apply to the Open University.

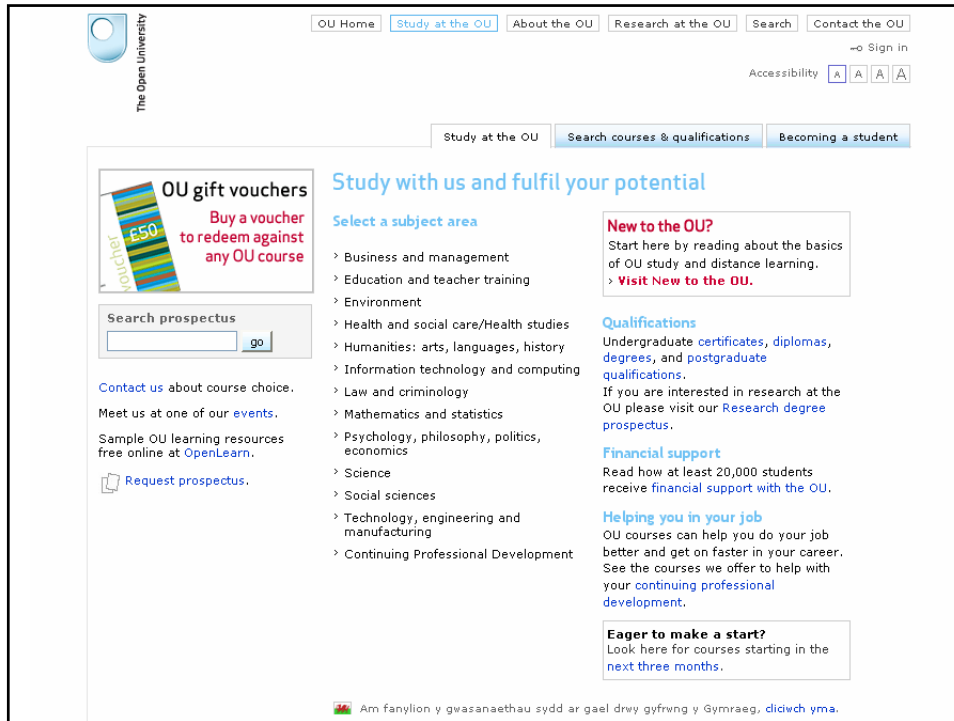


Margaret has taken several courses, following her interest in creative writing and literature, but she would now like to find a course on photography.



Martin is a busy business consultant looking for a leg up as he moves into management. He's like an MBA. Does the OU have a program for him?





Case study

The Oxfordshire Gateway

- How we reviewed a prototype for a site with an index to all government services in a local area

Step 1: Don't look at it

- Actually, did have to look at it (briefly) to check that the prototype was working
- Tried to avoid more than a glance

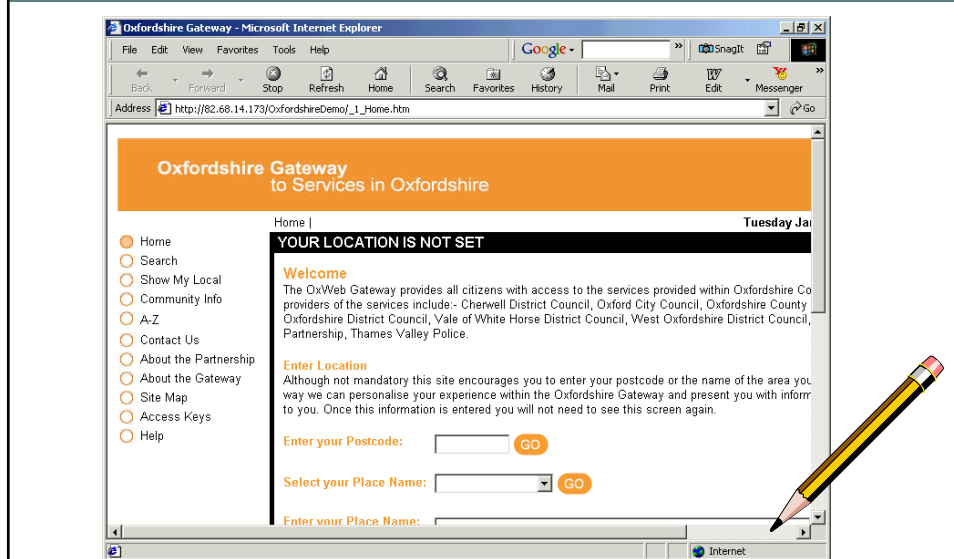
Step 2: Write a story

- Jenny: a young mother
 - Jenny is 20. She's married with two children under 4. They live on a three-bed semi on a big estate. She likes to get out but it's hard struggling with the kids. She left school after secondary school and is now a full-time mum.

She used the Web a lot at school, but these days it's mainly for shopping.

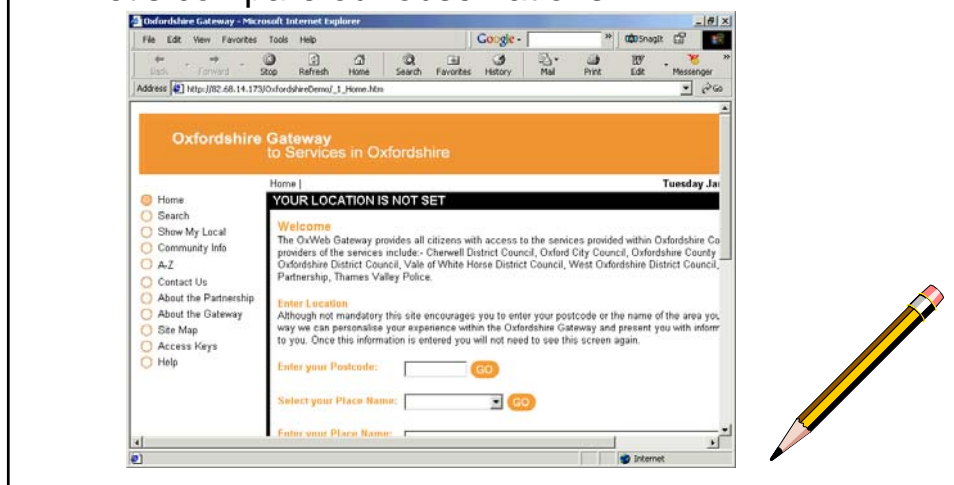
She doesn't encounter local government services very much, just gets annoyed if the rubbish isn't collected and she's been researching schools as her elder child will soon be starting nursery and she's also thinking ahead to primary school.

Step 3: Try it - Why is Jenny looking for a government service?



Step 4: Now look at it

■ Let's compare our observations



Step 5: Get a second opinion

- Combined review:
 - both of us
- Recommended usability testing
 - and they did do it
- Recommended accessibility review
 - and they did do it

Risks

- Client becomes over-confident
 - resists doing usability testing
- Consultant becomes over-confident
 - knows less about these users than she thinks she does
- Heuristic methods known to be rather poor at predicting actual problems
- What do you think?

What if
you've
got more
time?

The five-day version

- With five whole days...the answer is simple. Go find some real users.

Luxuries are available

- Run a proper usability test
- Watch staff using the data
 - Typing it in (if paper forms)
 - Retrieving it (for any forms)
- Track a batch of forms through the process
- Look at a sample of data
 - Easy if you have paper forms
 - A bit more challenging for other forms

How to make a review user-centered

- Think about
 - People first
 - Then, what they want to do
 - Finish with guidelines

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Whitney Quesenberg is a user researcher, user experience practitioner, and usability expert with a passion for clear communication. She has been in the field since 1989, helping companies from The Open University to the National Cancer Institute develop usable web sites and applications.

Whitney is past-president of UPA - Usability Professionals' Association, a leader in the STC Usability and User Experience Community and a Fellow of the STC.

Before she was seduced by a little beige computer into the world of usability, Whitney was a theatrical lighting designer on and off Broadway. The lessons and stories from the theatre stay with her in creating user experiences.

Visit her web site for articles and other resources



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Caroline Jarrett is an independent usability consultant. After 13 years as a project manager of computer systems integration projects, she founded Effortmark Limited in order to concentrate on 'what systems are for' instead of 'how the system is put together'.

Through her work with the United Kingdom tax authorities, she became fascinated with forms and now specialises in evaluation and design of paper and web forms, and effective implementation of business process that includes forms.

Her clients include (UK) HM Revenue and Customs, (USA) the Internal Revenue Service, the Australian Tax Office, Mayo Clinic, the Royal Bank of Scotland, Nationwide Building Society, NPower and Open University.

She is co-author of the textbook based on the course: "User Interface Design and Evaluation", 2005, published by Morgan Kaufmann/Elsevier.

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