

Praise for Moderating Usability Tests

Interacting with participants in a calm and neutral manner may well be the most difficult part of doing usability testing. Now you no longer have to worry about how to do that. Just follow Dumas and Loring's wonderful, practical advice and you will be prepared not only for typical encounters, but also for the unusual and unexpected, for doing remote testing, and for working with special populations. *Moderating Usability Tests* is a great resource for anyone who interacts with usability test participants.

—Janice (Ginny) Redish, President, Redish & Associates, Inc.

Everyone talks about research methods, but the formal aspects of those methods only get you so far. The difference between getting a little data or a lot of data, only discovering problems or getting ideas about solutions, bias or validity, throw-away data versus generalizable insights, often depends on the soft skills—the ability to effectively moderate testing. In the past, you were expected to get these skills through apprenticeships or trial and error. *Moderating Usability Tests* removes the mystery and provides practical advice on how to get the most out of research. It will be invaluable to students learning about usability testing for the first time, people newly charged with evaluating products, and even old hands looking to refine and improve their technique.

—Arnold (Arnie) Lund, Director of User Experience, Microsoft

You may not think that being a “Gracious Host” is among your assignments in moderating a usability test, but you will learn why this and other roles with similarly illuminating names are important to your success. In this generous book, Dumas and Loring give the benefit of their decades of experience and astute observation of both the foundational and the subtle aspects of conducting usability tests. Many questions you didn't think to ask until you were on the hot seat are answered here, and will help you achieve a level of confidence as a test moderator that may have seemed beyond reach, even if your participants are from challenging-to-test populations. With this highly ethical and thoroughly grounded program for developing moderator skills and avoiding pitfalls, Dumas and Loring make a strong contribution to the body of knowledge on testing products. The big surprise of the book is that their clear, reasoned, and detailed suggestions about interacting with test participants and developers will likely spill over and improve your relationships with coworkers, family, neighbors, and friends.

—Elisabeth Bayle, Bayle Collaborations

At this point, virtually everyone in the software industry knows what usability testing is. An unfortunate side effect of this awareness is that many people are conducting usability testing who have no idea how to do so in a way that will yield valid, reliable, and useful data. Other than the design of the test itself, proper and effective moderation of test sessions is one of the most important—and least understood—aspects of usability testing. Here is a book by two highly regarded experts that covers this topic thoroughly in a very readable format. No one who has not already been well trained should attempt to conduct usability testing without first reading this book cover to cover, and viewing all the excellent videos the authors provide on the book's web site.

—Deborah J. Mayhew, Deborah J. Mayhew & Associates

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Joseph S. Dumas

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Preface

From many conversations with other usability testers, we know that our training as moderators was typical. We both learned how to moderate usability tests the same way: a colleague let us watch a few sessions and then watched us struggle for one or two sessions. There was no formal training and no set of professionally accepted procedures.

Since then, we have moderated numerous usability tests and watched thousands of sessions and debated good and bad practices with colleagues over the years. Clearly, a logical and practical approach to training moderators to be as effective as possible in the pursuit of valid usability testing was overdue. We looked at the literature and found some good, but limited, advice. Two currently available books on how to conduct a test, Dumas and Redish (1993) and Rubin (1994), each have one chapter on moderating. A later source, Snyder (2003), has several chapters, but they focus on moderating tests of paper prototypes. No previously published authors have presented a set of rules that underlie effective moderating.

While preparing a tutorial on test moderation for the Usability Professionals' Association annual meeting, we realized that our best practices (developed through the trials and errors of two decades) could be captured in a set of professional guidelines. Moderating is more than just an art. Unfortunately, it is not something any intelligent person can walk in and do effectively. So, we created the ten golden rules of moderating that we present in chapters 3 and 4 and apply throughout.

Our experiences made very clear that new moderators need more than just verbal descriptions of how to interact with test participants. They need to see experienced moderators in action, dealing with specific situations. To illustrate how the rules translate into practice, we filmed a set of videos, several of which were later refilmed to accompany this book. In addition, we invited some of our colleagues to discuss what they saw in each video. We filmed these panel discussions, too. The videos and panel discussions can be found on the publisher's web site (www.mkp.com/moderatingtests). Also on the site is a table that lists all of the places in the book where each video and the web site are discussed.

Our goal for this book is to enrich the learning experience for new test moderators. In doing so, we hope to establish a consensus that we and our colleagues can use to move moderating from an art passed on in private to a set of agreed-upon practices that can be used in an effective training program.

Acknowledgments

We have had the support and hard work of many colleagues in creating this book. Several of our colleagues at Bentley College helped us clarify our ideas and our writing. Lena Dmitrieva and Eva Kaniasty reviewed the first drafts of the chapters, stimulating us to rethink some of our initial ideas. Rich Buttiglieri handled the video and recording technology and acted as the director for the videos. Andrew Wirtanen edited and transferred the videos onto the web site and Steve Salina filmed the panel discussions. Chris Hass's expertise in interacting with disabled participants provided much of the practical advice found in chapter 10.

The reviewers of the manuscript were an enormous help: Whitney Quesenbery, Kelly Gordon Vaughn, Catherine Courage, Ron Perkins, Steve Krug, and Mary Beth Rettger. Each one made a unique contribution that improved our ideas and writing. In addition, they were uniformly encouraging, which all authors need during the stressful days when a finished manuscript seems unreachable.

The colleagues who acted in the videos allowed us to illustrate our golden rules. We often asked them to portray poor practices, which they did with good humor. The expert panel we asked to comment on the videos provided exactly what we wanted—their spontaneous and honest reactions to what they saw. We had great fun watching them provide insights to supplement the videos and the book.

Finally, we want to thank Diane Cerra at Elsevier, who encouraged us to write this book and whose encouragement and guidance in its early stages were invaluable.

* * *

For seven years I taught a course in usability evaluation in the Bentley College graduate program. A section of every course included a discussion of moderating a test. I am grateful to the students in those classes who pushed me to examine my assumptions and to find ways to explain my thinking. My wife, Martie, has encouraged me to write this—my third book—without complaint. Somehow, back in high school, she saw the potential in me that I couldn't see in myself, and I saw in her the woman to spend a life with. Forty-three years later, our relationship continues to evolve.

Joe Dumas

The person to whom I am most grateful is Joe. He became my mentor way back in 1986 when usability testing was in its infancy, and our professional paths have crossed so often that they seem to be interwoven. It was Joe's idea to present a tutorial on the topic of

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interacting with test participants in the first place, and it was his idea to ask Diane Cerra about turning it into a book. He and I make a good team, and I am proud to call him my friend. I'm also grateful to my husband, Jon, and my son, Stephen, for giving me the time, space, and quiet to work on the book for so many months.

Beth Loring

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Moderating Usability Tests