

CONVERSION MACHINE

MODULE 2

Data Collection

LESSON 2 Worksheet
User Testing

User Testing

Step by step process for in person user testing workshops

The first step is to create a specific goal for your testing workshop.

This normally involves your typical path through your website. The steps your users take from the beginning to the end of your sales funnel.

The user is asked to perform a series of tasks and is then observed, in your step by step process you will ask users to dictate and explain what they are thinking and doing as they progress.

This allows you to learn insights from their reasoning and thinking as they go through your sales funnel.

Let's learn the steps you will take to run a user testing workshop.

Step 1: Create a goal

Focus on your 'one core task' you want all visitors to complete on your website, whether this be to buy, sign up or subscribe.

The goal of your user testing workshop should be to try to understand any roadblocks that exist when trying to complete this task.

Step 2: Find people for your user testing exercise

You'll need to recruit people to your workshop, these people should be real leads if possible or people from a relevant target audience for your business.

Here are some important factors to consider when planning your testing workshop:

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- Make sure the users fit your target audience
- Get at least 10 people for each testing session
- Make sure the male and female split matches your normal website visitors gender split, you can check this in your google analytics account by going to:

Audience > Demographics > Gender

You may need to incentivise people to come to the testing sessions with at least free food and drinks, though try to avoid this if possible as it may mean you get users who are only there for the free food!

Here are some places to find people for your testing sessions:

- Your email list, focus on people in your city as the workshop is in person
- Your social accounts
- Your first degree network, who do you know that is also within your target audience
- Clubs or institutions, for example if you have a tennis app you could approach a local tennis club

Step 3: Plan your task and questions

Next you need to take your 'one core task' you wish the user to complete, you'll ask three broad questions during the sales funnel to learn how well your website communicates and feeds back to the user to help them complete this task.

Question 1

Ask them to look at the homepage or landing page for 5 seconds, then hide the homepage, ask them what the purpose of the website is. This should test how well you communicate to the user the benefit of your product or service and how you uniquely enable this benefit.

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Question 2

Ask them to complete your 'one core task', ask them to dictate what they are thinking and what they are doing as they navigate through your sales funnel.

Question 3

Ask them after navigating to the 'one core task' conversion page--for example the checkout page on an ecommerce website--if they feel like they would have checked out. And if yes or no, why?

Categorize each person

The category allows you to divide each interview into groups, ask yourself:

What was the biggest learning or focus for their interview, this can be related to a feature or a reservation around buying from you for example.

Make sure the questions you ask people within tasks are not 'closed questions' or leading. For example if you ask:

"Do you like the red button colour?"

People will often only provide a "yes" or "no" answer, providing you limited insight. People will often feel pressured by the context to answer "yes", skewing your data.

Instead ask:

"How do you feel about the colours within the website?"

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Don't analyse any data during the workshop, it is better to concentrate on the person testing and, if need be, the taking of notes. Review your data later, and if it was possible to record the audio, screencast or video the interview in its entirety you can review in detail to type up the your data.

You'll go through this process in detail during Module 3 - Data Analysis. I'll show you some sample data to analyse and how the process works in practice.

Step 4: Record the workshop audio

Make sure to record the audio of the user testing workshops. You will use this to create transcripts for further analysis in the next module.

If you are also able to record the user's screen using a screen recorder such as Camstudio or Appsee then ensure you do. This will again be very valuable during the data analysis phase.

That concludes your step by step process for running your own in person user testing workshop.

Automated user testing sessions

These recordings are an important part of the data collection process and allow you to have a detailed look at how your visitors behave on your site.

Typically visitor recording is more expensive and time consuming to its alternatives such as mouse tracking but also provides much deeper learning and feedback.

You get to actually watch in real time as people visit your landing pages, complete your forms and learn the real barriers to conversion on your site.

I recommend to use [usertesting.com](https://www.usertesting.com) for collecting automated user testing data.