

# Facilitator Checklist

---

## Beginning

- Welcome the Users
- Introduce yourself, the observers, and the computer
- Ask the participants to introduce themselves
- Explain the goals & logistics of the session. "We're testing the system, not you."
- Set expectations: design still in progress, prototype unfinished, etc.
- Offer treats
- Hand users the first task

## End

- Ask observers if they would like to ask the participants any questions
  - Ask the participants if they would like to ask any questions
-

## Facilitator Script

Hi – my name is Jeff and I'll be leading the session today. Also in the room we have Leah Buley who will be acting as our computer, and \_\_\_\_\_ who will be observing.

I'm going to be reading from a script so that I'm sure to give you all the information you need. I've been asked by Client Technology to help evaluate the usability of the planned enhancements to GPS, the Global Performance System. You've been asked to help because your opinions and experience are important and representative of the site's users.

The most important thing for you to remember is that this exercise isn't designed to test *you*, it's designed to test the website; we want to discover how it can be improved. There are no right or wrong ways to complete the tasks or answer the questions.

When we begin, feel free to ask questions at any time. I'll answer them the best I can. Also, I encourage you to tell me what you're thinking about the tasks and the screens, even if it's "I'm drawing a blank!" This helps us understand your perceptions in addition to your actions.

I'll be asking you to complete a number of tasks. Each task is designed to evaluate an area of the system. Again, there's no right or wrong way to complete the task. I want you to talk about the situation, evaluate your options and take what you think is the best course of action. When you feel you've completed the task please tell me that you're done.

This is what's called a paper prototype, so it's done with paper and glue and pens rather than an actual computer and web pages. We do this because it's lots faster to do and so it gives us a chance to check how things are going before we get too far down the road. It also means that things are a bit rough; certainly not as polished as the final system will be. Bear with us and ask if anything is unclear.

Let me walk you through an example of how this will work.. This is the Google home page. If I gave you a task to find information about pet rocks, you might type in "Pet Rocks" and then "click" on the search button. Leah will be playing the role of the computer and will make these paper pages respond like the application will. So if you clicked on the back button (click), she'd then show us the main Google page again. Notice how I'm saying "Click" when I click on a link. That helps us know that you're actually doing that action and not just talking about it. If we "click" on "I'm feeling lucky" she'd take us directly to this pet rock page. Having found the information that the task asked you to look for, you'd say: "I think we're done."

Does that make sense? Any questions before we begin?

GPS Usability Evaluation  
**Employee Tasks**

<b>E1 – Getting Started</b>	
<i>Goal/Output</i>	User logs into system, starts the mid-year review, and saves self-assessment portion to the KTO update.
<i>Instructions for User</i>	<p><b>An email goes out to the firm explaining that it's time to start mid-year reviews. This year they will be submitted through GPS, and will contain a KTO update and an individual development plan. Log into GPS and start the mid-year review.</b></p> <p><b>As soon as you finish the KTO update (step 1), you are distracted by an incoming call. Save your work so far and exit the system.</b></p>
<i>Inputs/Assumptions</i>	<ul style="list-style-type: none"> <li>• User is at GPS login screen</li> </ul>
<i>Steps</i>	<ol style="list-style-type: none"> <li>1. Log in</li> <li>2. Follow "start" option</li> <li>3. Add comments to KTOs</li> <li>4. Write in unplanned accomplishments</li> <li>5. Click next button</li> <li>6. Exit system</li> </ol>
<i>Time for Expert</i>	5 mins
<i>Notes</i>	<ul style="list-style-type: none"> <li>• Does user understand what will be required of them as they start the mid-year review? Ask them to describe what they think the process will be to get from start to finish.</li> </ul>

GPS Usability Evaluation  
**Employee Tasks**

<b>E2 – Complete Self Assessment</b>	
<i>Goal/Output</i>	User returns to GPS and completes remaining sections of the Mid-Year Review.
<i>Instructions for User</i>	<b>A few days later you find yourself with some extra time to finish filling out your mid-year review. Go back into GPS, and complete the remaining sections. (But don't submit yet.)</b>
<i>Inputs/Assumptions</i>	<ul style="list-style-type: none"> <li>•</li> </ul>
<i>Steps</i>	<ol style="list-style-type: none"> <li>1. Log in</li> <li>2. Follow option to "edit"</li> <li>3. Click to competency assessment</li> <li>4. Fill out competency assessment</li> <li>5. Click next</li> <li>6. select a competency for development (ideally the recommended competency)</li> <li>7. Fills in development plan</li> <li>8. <i>(Optional)</i> Adds long term development plan</li> <li>9. Clicks next</li> <li>10. Adds general comments</li> <li>11. Clicks save</li> </ol>
<i>Time for Expert</i>	10 mins
<i>Notes</i>	<ul style="list-style-type: none"> <li>• Does user easily figure out where they left off?</li> </ul>

GPS Usability Evaluation  
**Employee Tasks**

<b>E3 – Review and Submit Mid-Year Review</b>	
<i>Goal/Output</i>	User reviews all sections of mid-year review, marks a development KTO, then submits.
<i>Instructions for User</i>	<b>It's a few days later, and you want to review your mid-year review one last time before submitting it to your manager. In doing so, you realize that one of your KTOs is really about professional development, so mark it as a development KTO. Finally, submit your mid-year review to your manager.</b>
<i>Inputs/Assumptions</i>	<ul style="list-style-type: none"> <li>• User starts back on GPS home page</li> </ul>
<i>Steps</i>	<ol style="list-style-type: none"> <li>1. Follow option to “view”</li> <li>2. Find development KTO on “KTO Update”</li> <li>3. Checks box to flag development KTO</li> <li>4. Clicks next through remaining pages (or cancel) to end up at mid-year review guide</li> <li>5. Clicks submit button</li> <li>6. <i>(Optional)</i> Enters comments</li> <li>7. Clicks submit</li> </ol>
<i>Time for Expert</i>	2 mins
<i>Notes</i>	<ul style="list-style-type: none"> <li>• Does user understand where to go to update KTOs? (Are they confused at all about whether KTO updates fall under KTO tab or mid-year review tab?)</li> </ul>

GPS Usability Evaluation  
**Employee Tasks**

<b>E4 – Review Manager’s Assessment and Acknowledge or Request Changes</b>	
<i>Goal/Output</i>	User review manager’s portion of the mid-year review and acknowledges or requests changes.
<i>Instructions for User</i>	<b>You submitted your mid-year review and then had a meeting with your manager to discuss what you wrote. After that, you receive the following email from your manager. What is it asking you to do? What do you do?</b>
<i>Inputs/Assumptions</i>	•
<i>Steps</i>	<ol style="list-style-type: none"> <li>1. Follow link in email to employee record mid-year review guide.</li> <li>2. Follow “view” option</li> <li>3. Click through 4 pages, reviewing manager comments, to end up back at mid-year review guide</li> <li>4. Follow “acknowledge” option</li> <li>5. Enter date</li> <li>6. Click “acknowledge” button</li> </ol> <p style="text-align: center;"><b>OR</b></p> <ol style="list-style-type: none"> <li>4. Follow “request changes” option</li> <li>5. Enter comments</li> <li>6. Click “request changes” button</li> </ol>
<i>Time for Expert</i>	3 mins
<i>Notes</i>	• Does the user understand that they need to do something else before the mid-year review will be complete?