First Fridays Roles and Responsibilities

1. Facilitator
2. Facilitator in Training
3. Organizer
4. Observation Room Manager / Hall Monitor
5. Greeter
6. Stakeholder
7. Participants
8. Observers
19. Remote Observers

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1. Facilitator

Roles:
1. Tour guide - You're responsible for telling the participants what to do, keeping them moving and keeping them happy. Unlike an actual tour guide, though, you're not going to be answering their questions about the sites.
2. Therapist - Your main job is to get the participants to verbalize their thoughts as they use what you're testing.
Also: Does the tests, runs the debriefing, coordinates with organizer to pick site, create tasks, assist with recruitment if necessary, main liaison with stakeholder site

Duties Checklist:

Three weeks before
- Figure out what you're going to be testing (site, wireframes, prototype, etc.)
- Decide what kind(s) of users you want to test with - Any? Project managers? Content creators? General public?

Two weeks before
- Create a list of tasks to test
- Get feedback on your list of tasks from the project team and stakeholders
- Assist with screening participants and scheduling them into time slots

One Week Before
- Decide with stakeholder if you need to record the session or not
- Do a timed dry run of tasks and tweak if needed

Two days before
- Finish writing the scenarios
- Do a pilot test of the scenarios
- Take screenshot of the pages you will be testing

One day before
- Get any user names/passwords and sample data needed for the test (e.g., account and network log-ins, dummy credit card numbers, or test accounts)

Day of Test
- Test the screen recorder (if used): do a short recording (including audio) and play it back
- Create bookmarks for any pages you'll need to open during the test
- Make sure you have phone number for the Observation Room Manager and / or the phone in the room they are using
- Make sure the speakerphones in the test room are working
- Turn off or disable anything on the test computer that might interrupt the test (e.g., email or instant messaging, calendar event reminders, scheduled virus scans)

Before each Test
- Start screen sharing session, if necessary
- Reload sample data, if necessary
- Clear the browser history
- Open a "neutral" page (e.g., Google) in the Web browser

After each Test
- Stop the screen recorder! (if used)
- Save the recording! (if used)
- End the screen sharing session, if necessary
- Take time before the next session to jot down a few notes about things you observed
- If it's the last test of the day and you've been using a desktop computer, copy the screen recording files to a CD or thumb drive

After entire day of Testing is done
- Thank you to participants
- Send notes to facilitator
- Follow up one week later with sponsor and see how they are progressing
- Hold post-session discussion next week with all staffer to discuss how the test went and any changes that need to be made

2. Facilitator in Training

Role: To observe Facilitator during testing and debriefing process, and conduct the third test

Duties Checklist:
Day of Test
- Observe a test in the observation room and / or observe a test in the facilitation room
- Optional: Conduct the third usability test with assistance from Facilitator

3. Organizer

Roles: Logistics, catering, room reservations, setup + takedown, equipment, coordinate with facilitator to pick sites, supplies. recruiting, communication and RSVPs with observers, handling directions, calendar invites, reminders, communicating timing of tests, marketing and outreach

One month before
- Book a large observation room and a small test room with internet access

Two weeks before
- Help screening participants and scheduling them into time slots
- Send Calendar invite to observers (location, room, time, additional details: light continental breakfast, and lunch during the debrief, contacts on the day of the test)
- Send Calendar invite to participants
- Send Calendar invite to back-up participants
- Update contact sheet with mobile phone numbers, email, etc.
- Set up screen sharing software (e.g. GoToMeeting)

One Week Before
- Designate Greeter
- Confirm waiting area
- Update contact list with mobile numbers, emails, etc.

Two days before
- Send email to the participants with directions, parking instructions, location of the test room, name and phone number of someone to call on the test day if they're late or lost, and the non-disclosure agreement if you're using one
- If there are remote observers, follow the steps below:
    - Email handouts, Roles and Responsibilities to Steve's website (http://www.sensible.com/rocketsurgery/index.html)
    - Email gotowebinar link
    - Tell remote observers they can participate in debrief by sending us their top 3 usability problems/comments

One day before
- Send security list to Security coordinator (if applicable)
- Email reminder to observers
- Recruit someone to manage the observation room for you and give him/her a copy of the Hall Monitor's Guide
- Print out
    - sets of the scripts + scenarios
    - scenarios on individual pieces of paper
- Make sure incentives for participants are ready

- Verify that no one has double-booked test and observation rooms
- Set up participant waiting area
- Give incentives to facilitator
- Make handouts for participants
    - Recording consent form
- Make copies of handouts for observers
    - Instructions for Usability Test observers
- Print copy of greeter responsibilities
- Pick up snacks and beverages for the observation room

Day of Test
- Set up conference room
- Set up test room
- Set up breakfast, coffee
- Start GoToMeeting (if needed)
- List contact numbers for observation room, test room, greeter
- Confirm lunch order
- Buy box of coffee, breakfast supplies, etc.
- Set up conference room (with assistance from observation room manager)
- Set up test room (with assistance from observation room manager)
- Set up breakfast, coffee (with assistance from observation room manager)
- Pick up lunch
- Set up lunch outside observation room
- Make sure remote users (if any) are able to log on, assist with any troubleshooting
- Bring Supplies:
    - Pens
    - Markers for note boards
    - Instructions for Usability Test Observers handouts
    - Hall Monitor's Guide Handouts
    - Greeter Responsibilities
    - Breakfast goodies
    - Coffee for breakfast
    - 2 Computers
    - Speakers
    - Microphone
    - Incentives
    - Paper products (utensils, cups, napkins)
    - Pitcher for water

4. Observation Room Manager / Hall Monitor
Note: In some cases, the Organizer can fulfill this role

Roles: Manage the observation room, make sure people have supplies, that people keep focused and are on task, and that all the tech equipment works.

Duties checklist:
Prior to the test
- Hand out 3 handouts, pens, etc.

9:00am (approx)
- Goals and Objectives of the Usability Session
    - Reference the handout *Instructions for Usability Test Observers*
    - We'll have 3 test sessions and each will last approximately 50 minutes. You'll have an opportunity to ask the test participant questions following the test.
    - During each session please make notes about anything that you noticed and at the end of each session, use the sheet to jot down the three most serious usability problems you observed.   We'll discuss these during the debrief session and make a list of the most serious usability problems.
    - Please limit your conversation to what you are observing and be mindful that the test participant will also give feedback verbally which will help identify usability problems.
    - We'll take a 10 minute break after each session and we'll start the debrief session promptly at 12 noon.
- Introductions – have everyone go around the room and introduce themselves
- Once you are done with introductions, ask the test room if we're ready and we'll being the tests

9:45am (approx) – questions from the observation room
BREAK

10:00am – start next test
10:45am (approx) – questions from the observation room
BREAK

11:00am – start next test
11:45am(approx) – questions from the observation room
12 p.m. Break for lunch. Duties end (are taken over by Facilitator).

Reminders
*remember to be on mute when the observers aren't asking questions

5. Greeter

Role: Meet testers in the lobby and get them through security. Show them to the waiting room and then to the testing room when it's time for their test.

Duties checklist:
- Welcome participants (check them in at security and escort to waiting area)
- Escort participants to the test room when we're ready to start
- Escort participants down to the lobby or elevators when each test is finished
- Contact point for participants to call when in the building

6. Stakeholder

Role: To help the Organizer and facilitator set up the test, be present in the observation room for the test with your colleagues and developers and make the changes when everything is done.

Duties checklist:
- Participate in meeting / conference call with facilitator about tasks
- Assist with participant recruitment (if necessary)
- Recruit design team and other staff as observers
- Sign letter of intent
- Stakeholders must participate in person
- Implement usability recommendations
- Take before and after pictures of site to be tested
- Share screeenshots with First Fridays Team

7. Participants

Role: The most important part of the whole test! Your honest observations, feelings and comments will be tremendously helpful in improving the website you are viewing.

Duties checklist:
- Accept calendar invite when it is emailed to you
- Show up 10 minutes early to your test time

8. Observers

Role: Observe the usability participants in the morning and contribute comments to the debrief in the afternoon.

Duties checklist:

Day of Test
- Show up on time
- Take notes during the tests, noting the top 3 usability problems each participant is experiencing
- If you need to make a phone call please excuse yourself
- Do your best to not check email or distract yourself during tests - there is a lot going on and it's easy to miss something
- If you able to stay for lunch and the afternoon debrief please do so

9. Remote Observer

Role: Like observers, only remotely

Duties checklist:
- Accept calendar invite when it is emailed to you
- Test remote link when it is emailed to you
- Log into webinar 5 minutes early to make sure it loads properly. Make sure you can hear and see the activity.
- Depending on the instructions you were given, either email your comments to the Observation Room Manager or call them in
- Call or email the Observation Room Manager if you have any technical difficulties