OPM Usability Testing Conversation Guide Template

Use this template for usability testing of wireframes, prototypes, and products. Be sure to complete all [information in brackets].

Intro - 5 minutes

Thanks for joining us today! My name is [name] and I also have some colleagues on the line/with me observing and taking notes. Today we're going to talk about [description of your project].

Before we start, a few things I want to mention:

- **This entire session should take about [time].** I want to be sure not to keep you much longer, so I may occasionally prompt you with the next question or topic.
- **In this session, we want to hear your honest opinions.** We just want to improve your experience with OPM so we can better meet your needs. I will not be offended by any opinions you express, and I welcome your feedback.
- *If applicable:* **You'll be interacting with a prototypes and a demo tool.** This is a demo tool that may not function exactly the way you expect. Some areas of the prototype will be clickable, and some will not. Since it's a demo, none of your actions will affect your actual OPM information or benefits.
- **If for any reason and at any time you want to stop the session, please let me know.**
- *If in-person session:* **Are you comfortable if I record your screen and audio as we talk today?** We use the recordings to confirm that we have captured your opinions accurately. The recordings are destroyed after we complete analysis, and none of your comments will be attributed to you directly.
  - *If yes:* **Once I start recording, I am going to confirm that you are ok with me recording this session once more.**
- *If remote session:* **Are you comfortable if I record my screen and audio as we talk today?** We use the recordings to confirm that we have captured your opinions accurately. The recordings are destroyed after we complete analysis, and none of your comments will be attributed to you directly.

  o *If yes:* **Once I start recording, I am going to confirm that you are ok with me recording this session once more.**

Start recording.

- ****I have started recording. I'd like to confirm: Are you comfortable if I record my screen the audio as we talk today?"

Warm-up Questions (optional) – [x] minutes

Before we get started, let's begin our session together with a few warm-up questions.

- [Question 1]
- [Question 2]
- [Question 3]

Background info about the participant should have been provided by Coordinator already, so use this time to ask any other questions that you feel will help with the session. This warm-up is not required.

Task 1: [Task Name] – [x] minutes

- [Step 1]
- [Step 2]

Things to watch for:

- [Does the participant understand meaning of xyz?]
- [Does the participant notice xyz?]
- [Etc.]

Task 2: [Task Name] – [x] minutes

- [Step 1]
- [Step 2]

Things to watch for:

- [Does the participant understand meaning of xyz?]
- [Does the participant notice xyz?]

- [Etc.]

Task 3: [Task Name] – [x] minutes

- [Step 1]
- [Step 2]

Things to watch for:

- [Does the participant understand meaning of xyz?]
- [Does the participant notice xyz?]
- [Etc.]

Post-Task Interview – [x] minutes

- [Question 1]
- [Question 2]
- [Question 3]
- Do you have any questions for me?

Thank-You and Closing – [x] minutes

We really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us as we continue to improve the way OPM serves its customers.

Thanks! Lastly, do you know any other [federal employees, federal retirees/annuitants, or other customer sub-group] who might be willing to participate in a future user research session? If Yes: Thank you! I'll have our team send you an email with a little blurb that you can pass along.

Great, well thank you so much again, and enjoy the rest of your day!