

Step 2: User Profiles

Purpose of this step:

The purpose of this step is to gain a better understanding of what different user categories there are and how best to design the interface based on these users and their requirements.

Overview:

- The user profiles are the primary players in the Contextual Task analysis.
- The Usability goals are also driven by User Profiles.
- There are two techniques for obtaining the User Profile. Questionnaires and Interviews with knowledgeable worker. The questionnaires technique is used in this usability testing process.

Practical application of these principles to your site:

- 1) **Determine user group/categories:** Normally user categories tend to already be defined by job category. For example doctors, nurses and technicians might all have a different perspective on how they might interact with a particular software. Also, marketing experts may be required to supply sample populations of external customers.
- 2) **Determine relevant characteristics:** Hold meetings with appropriate department heads in order to gather input on the user characteristics that should be polled in the User Profile.
- 3) **Develop a draft questionnaire and get management feedback:** Write an introductory paragraph explaining the correct procedure for filling out the questionnaire. Add and remove questions as appropriate. Revise questionnaire as needed.
- 4) **Conduct a pilot questionnaire:** Conduct two to three pilot questionnaire interviews per user group. This will ensure clarity of wording, completeness and good balance in questioning.
- 5) **Revise:** Review the pilot questionnaires and revise as needed.

- 6) **Select a user sample:** On average internal questionnaires have a 30% return rate and external questionnaires have a return rate of 10%. Aim to have about 100 users returned from each user group if possible.
- 7) **Distribute the questionnaire:** There are several methods of questionnaire distribution (email, letters etc.), any is appropriate as long as the return rate is high enough.
- 8) **Design data entry/analysis:** Use a stats package or Microsoft Word to assist in the entry and analysis of questionnaire results. Do not make assumptions based on results. It may be useful to get the input from statistics experts for detailed review of the data results.
- 9) **Document:** Document the results of the analysis in a conclusive User Profile document.

Examples: See examples of this step in the “Examples” folder.